WEALTHCARE FINANCIALS

Checking In — A Note from Kris

Just a Quick Hello

I hope things are going well on your end. I wanted to reach out — not to pitch anything, just to say I'm thinking about you and appreciate the trust you've placed in Wealthcare Financials.

A lot is changing in the financial and healthcare landscape right now, and I know that can feel like a lot to track on top of an already demanding career. My job is to keep an eye on those shifts so you don't have to.

One thing worth keeping in mind: the financial foundation you've put in place matters precisely because life can be unpredictable. The Social Security Administration has noted that roughly one in four working people may experience a disability before retirement — a reminder that protecting your income is just as important as growing it.

If anything has changed in your situation — a new role, a move, a growing family — it's always worth a quick conversation to make sure what you have still fits where you are.

No action needed on your part. I'm simply here when you need me. Feel free to reach out anytime.

— Kris Schwartz, Wealthcare Financials

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