WEALTHCARE FINANCIALS

Checking In — A Quick Note from Kris

Just Wanted to Say Hello

I hope things are going well on your end — in practice, at home, or wherever life has you right now.

I don't have anything to sell you today. I just believe good financial relationships shouldn't only show up at renewal time or when something goes wrong.

That said, if anything has changed in your world — a new position, a shift in income, a partner joining or leaving a practice, or simply questions you've been meaning to ask — my door is always open. Life moves quickly, and coverage or planning that made sense two years ago may be worth a second look as circumstances evolve.

A few things worth keeping in mind as a general rule:

- Major career or life transitions are often the right moment to revisit your income-protection picture.
- Policy documents can be easy to file away and forget — knowing what you own and why it works is genuinely valuable.
- I'm here as a resource, not just a transaction.

If anything comes to mind, feel free to reply here or give me a call. And if everything looks good and life is smooth — that's great news, and I'm glad to hear it.

Take care, Kris Schwartz Wealthcare Financials

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