

Nicole Ferrell

From: Parkhurst Financial Services, Inc. <info@parkhurstfinancial.com>
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To: nicole@parkhurstfinancial.com
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Save the Date - Annual Client Event - Tuesday, October 6th

We are excited to announce we have set our annual client event for Tuesday, October 6th, 2020 from 12 - 1:30pm. Given the ongoing COVID situation, it is unlikely we will all be able to gather at Lockkeepers in person as we have done in the past. The health and safety of everyone is our top priority. However, we are continuing to monitor the situation and it is likely we will do the event via video conference/Zoom. More details will be provided in the coming months regarding registration and log in information.

We will have speakers who will discuss:

- **Economic and Market Update**
- **Tax Update and Planning Tips**
- **Review of the SECURE Act and implications for you and your heirs**
- **Estate Planning Overview of current laws, including gifting limits and strategies to consider**
- **It is shaping up to be another great event so please block off that date/time on your calendar!**

Client Satisfaction Survey

To better meet your needs and to enhance the quality and effectiveness of our products and services, we have integrated the use of a survey into our practice. This brief survey allows us to gain insight into the strengths of our practice, as well as to pinpoint areas for improvement. Our goal is to continue to offer you the best experience and the highest levels of customer service.

In the month of July, you will be receiving a hard copy survey in the mail at your home address. Please take 10-15 minutes to complete it and return in the self-addressed stamped envelope that will be included. As our valued client, we sincerely appreciate you taking time to complete this survey.

We hope you and your families have a nice summer!

**Best Regards,
The Parkhurst Team**



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