

WATERFORD ADVISORS

An SEC Registered Investment Advisor • Certified Financial Planner™

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Basis for Developing a Client / Advisor Relationship:

*** Please describe below why you have contacted Waterford Advisors LLC and what you plan to accomplish through a relationship with our firm.**

Ex: My wife and I will be entering retirement soon. We each have a retirement account and some additional savings, but we're not sure that we will have enough funds to do the activities that we've planned during those years and would like some guidance.

Completed by: _____