



KNIGHT HAYES  
Private Client Services

Wealth Planning Report

Prepared For: Mr. John Doe

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16<sup>th</sup> October 2017

## Wealth Planning Report

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A Thank You

Dear John,

Thank you for approaching us to review your current circumstances and provide you with some suitable solutions to achieve your goals and objectives. The following provides a summary of our discussions to date, which reflects upon both wealth-structuring considerations, as well some recommendations for your investment portfolio. If you feel I have missed anything or you wish to make any amendments, please let me know so we can review accordingly.

I look forward to discussing matters further soon.

Best Regards,  
Mike Foster-Dalporto

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