

**From:** [Richard Kahn](#)  
**To:** [REDACTED]  
**Subject:** Re: TD Ameritrade  
**Date:** Tuesday, January 22, 2019 5:09:35 PM

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sorry i missed you today  
lets talk tomorrow  
thanks

Richard Kahn  
HBRK Associates Inc.  
575 Lexington Avenue 4th Floor  
New York, NY 10022  
[REDACTED]

On Jan 15, 2019, at 4:54 PM, [REDACTED] wrote:

Rich,

Thank you for taking the time to speak to me today and helping me understand your financial needs. As your Senior Financial Consultant, my primary focus is to understand your goals and guide you through available investment solutions that could best help you pursue them. And as your financial needs change over time, I'm here to help you navigate and adjust your plans accordingly.

As we discussed, my priority is to offer you more personalized service and support, including:

- **One-on-One Support:** I'm here to get to know what's important to you and support you with ongoing portfolio reviews, defining and tracking your financial goals, and check-ins to help you get the most out of your experience at TD Ameritrade.
- **Personalized Guidance:** Once I understand your goals, objectives, and investing style,

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together we can develop an investing plan and identify solutions that may be a good fit for you.

- **Extensive Planning Resources:** I can help you gain a better understanding of the tools and resources available to help you manage your portfolio, research investments, and place trades.
- **Access to Specialists:** I can connect you to our knowledgeable specialists, who can provide added insight in several areas, including annuities, fixed income, trading, and professionally managed portfolios.

I look forward to helping you with your investing needs. Should you have any questions or concerns, I'm available 8:30 a.m. to 5 p.m. CST, Monday through Friday.

Best regards,

**Chad Markland**  
Senior Financial Consultant



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