

## Moving your portfolio to Godfrey Financial? *Here's what to expect:*

- We will open a new investment account with a new investment company
- We will send a transfer form to your existing institution to give your current advisor notification
- We will also provide you with an email template should you wish to contact your current advisor

Thank you for trusting me with your portfolio and I am looking forward to working with you.

**ALYNN GODFREY**

**FINANCIAL RETIREMENT SPECIALIST**

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