



FORNEY
FINANCIAL

Meeting Disclosure / Understanding:

First, let us say that we have much to be thankful for. We have had many great remote interactions with our clients amidst the various challenges our current world has presented us as your financial team.

For our mutual safety we have established the following guidelines for any in-person paperwork drop offs and/or meetings. While at our office please expect the following:

- ❖ SOCIAL DISTANCING – We are keeping the social distance protocols for both in-person meetings with clients and interactions between staff members in the office.
- ❖ MASK WEARING – Clients who prefer wearing masks during appointments are encouraged to do so and we also will wear them if preferred.
- ❖ SELF-QUARANTINE – If any of our team presents fever or flu like symptoms or believes they may have been in contact with someone who has COVID-19 they will work from home. We ask that clients in similar situations refrain from in person meetings two weeks following the possible exposure.

Like always, phone or video conference meetings can be scheduled in lieu of in-person meetings.

As this year has affected us all in different ways, we strive to respect each person's health and wellbeing. Once again thank you for your patience and goodwill in this as we prioritize and balance the needs for safety and connectivity for our clients and employees.

Please know that we appreciate your business and work to bring you our best each and every day. We look forward to our time together.

Your Forney Financial Team – Carla, Mary-Ashley, and Angela

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