



Outlook

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**[Draft] Update on the financial practice of Tim Smith -- I'm back!**

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**From** tim@fiscal-foundation.com  
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**To** info@fiscal-foundation.com <info@fiscal-foundation.com>

Good afternoon

It is with a great deal of excitement that I am writing to you.

I am thrilled to report that my Series 7 General Securities and my Series 66 Advisory licenses have been fully registered and reactivated. I am thrilled to have joined up with the great team at American Independent Securities Group, LLC (AISG) from Eagle Idaho. Talk about "full circle" ... I was very very close to joining this team about 15 years ago, but instead decided at that time to stop taking new clients. Now today, I'm back to taking new clients and all of their great knowledge and experience is in "my back pocket" going forward. I will have access to all services / products that I have had in the past, plus a few more options. I will be providing more information about AISG in the near future.

What does this mean? It simply means that I am fully able to advise you in all the financial services, methods, and approaches that I have been doing for more than 2 decades. The investment models and strategies you have been using for years, are again available for your accounts. The same team that has helped me over the past several years is all back together. In short, I have a new "home" for all of my investment and advisory business. The best part of that news is that means you too, if you so choose, have a "home" as well.

There are of course, many little hiccups to getting our practice operating at the same pace and level. There really is no "switch" to flip that would make everything "just work". There will be many things that we will need to work together on, but there you will not be required to do anything new or different than the work we've done together for years.

Much more information will be coming out very soon. For those of you that have already told me you want to transfer your accounts to me, **FIRST**, Thank you. **SECOND**, you will hear personally from me in the next couple of days about the timing and the steps for to occur.

I wanted to get this email out as soon as possible because there are certain to be questions not only about what is happening with me, but also what is going on in the world right now. I've already been asked by a couple of individuals if they should be doing anything different in light of the war in the Middle East. I want to help answer these questions for you. Even if we have not transferred all your accounts in, we can talk about my thoughts in these current times. To help with that, I'm attaching again all my contact information. Please replace any phone numbers / email addresses ect that you might have previously had for me.

Finally, thank you so very much for the faith and loyalty you have shown me and my practice. I have always believed that the best way to handle rumors or attacks is simply to let reality prove what is true. That is what I have tried to do in this situation; however, I recognize that many of you have felt uncomfortable. The truth is, my attempt at stepping back and beginning a process of slowing down, backfired. Both professionally and personally. I had a very dear client tell me that she felt abandoned. I understand that feeling. I too have felt

that way. I simply want to say, I never abandoned any of you. I simply had to go back through the steps to get back to business.

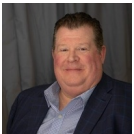
If you have specific questions about me or the past six months, I will be happy to answer and address any questions that may exist. Just reach out to me and we can setup a time to chat.

If you want your accounts transferred back under my management, please be certain to just reply back to this email. We will begin to schedule and process the transfers immediately upon your signature. Also we believe almost 100% of the process will be done with DocuSign. You will not need to make an appointment or come in to "wet sign". Of course, I am available to meet with you as well. We will begin to schedule annual reviews with clients, as soon as the accounts are transferred.

No more looking back. Let's move forward together.

**With personalized service for you and your family,**

*Tim Smith*



**Tim Smith**  
**Financial Consultant, Fiscal Foundation**

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208.274.9901

[www.fiscal-foundation.com](http://www.fiscal-foundation.com)

[tim@Fiscal-Foundation.com](mailto:tim@Fiscal-Foundation.com)

1120 S Rackham Way Suite  
300  
146

PO Box

Meridian, ID 83642



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