

To whom it may concern:

I am more than happy to write this letter of recommendation for Independent Planning Group, a financial planning organization specializing in family wealth and retirement income planning. With offices in Hernando, Oxford, and Memphis, Independent Planning Group works with individuals and families to develop financial strategies designed to provide greater security and peace of mind for generations to come.

Independent Planning Group provides personalized financial planning and investment advisory services tailored to each client's goals and circumstances. Its approach is centered on helping clients develop thoughtful strategies for managing their wealth, preparing for retirement, and addressing the financial considerations that come with different stages of life.

At Independent Planning Group, it is the people standing behind the organization who make all the difference. Its team includes experienced financial planners and specialists with a range of professional backgrounds and designations, allowing clients to work with knowledgeable professionals who understand their individual needs. Their personal approach, professionalism, and willingness to take the time to understand each client help create lasting relationships built on trust and confidence.

I highly recommend Independent Planning Group to individuals and families seeking knowledgeable financial planning and guidance for their financial futures. Its experienced team, personalized approach, and focus on helping clients achieve financial security make it a valuable resource for those planning for today, tomorrow, and future generations.

Sincerely,

Madeleine Borgia
Strategic-Partner
Schooley Mitchell