

MJ EVERSON



*financial*

Dear Friend,

April 2007

Had you thought I forgot? My apologies that my monthly letter has not been so monthly this year. But as of now, it is back on track. There has been a lot of change going on and I'd love to take a moment of your time to catch you up.

As of March 26, we have a permanent and full-time Office Manager. Joan Sorensen comes to us from JP Morgan Private Banking in San Francisco where she headed up a team of support specialists who assisted the traders and advisers. She has extensive experience in the industry and certainly classes up the joint!

Joan's main role here is to organize and manage my office so I can continue to concentrate on my main focus: your investments. When I first opened my office, I used to do all of this on my own. However, thanks to your referrals, I can no longer afford to not have quality help; and Joan is very quality help. Welcome aboard, Joan!

In other news, I finally bit the bullet and enrolled for my Certified Financial Planning designation. This involves a series of six tests and a final I must pass before being granted the distinguished designation. I should pass the exam this November. Not very many people have a CFP and I look forward to the added value the studies will bring to my advice on your investments. Wish me luck - it isn't an easy test!

Many of you have met Pat Bolognese, our business owner specialist. He started with us last June, earned his licenses and is out and about building up our 401(k) and business owner planning component. If you have any contacts at companies which may need our help in 401(k) or other planning, Pat is the man to contact. We have found many businesses get wronged by Wall Street firms just like most individual investors do: high fees, low returns. Apparently, bad advice is not exclusive to individual investors, but small businesses, too!

We look forward to a fantastic 2007! As of the end of the first quarter, our revenue had matched that of the entire year for 2005, and we're now nearing our 2006 revenue - and it is only April! We have all of you to thank for our continuing success. Your referrals have been amazing and we are always grateful for such trust in our ability to help your friends and family.

Keep an eye out for my next few mailers, as I'll be announcing a spring party, keeping you abreast of our progress and touching on topics concerning your investments in the current market. I look forward to seeing you all soon.

Yours truly,

Matt