PROFESSIONAL FINANCIAL SERVICES, INC.

"DESIGNING AND PROTECTING WEALTH"

ONE PLAN AT A TIME

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Mr. Robert E. Tucker
10913 Lawyers Road
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RE: Important Updates

Dear Bob:

I hope this Spring finds you well and thriving. Here are a few important updates for you.

Thursday, May 10 – Friday, May 25, 2012

I will be out of the country and probably without any access to email or phone from 5/10/12 – 5/25/12. In my absence **please make Faye Messer West your point of contact here at the office (703) 391-0299**. While I am hopeful nothing occurs that creates a problem requiring an immediate solution, please call her if you do have an urgent matter regarding your investments or other issues. Faye will be able to assist you or know who to contact.

If you feel you may have some need during my absence, **please try to reach out to me before May 10th. Otherwise, I will return to the office on Tuesday, May 29th** (Monday 5/28 is Memorial Day).

Thank you in advance for your understanding and patience.

Our Wealth and Protection Design On-Line system

Our system now has a new website look. If you have set up your private access, we invite you to go on-line and check it out. If you do not have on-line access, or if you need help, please call Faye for guidance.

The new client site features the following:

- **A redesigned "Home" page** focuses on providing you the information you want to see about your finances on a daily basis with multiple displays of the information available so you can choose you own data presentations.

- A **greatly simplified** means for you to enter your **connections and fact data.**

- **New Spending and Budgeting** function based on transactions the system automatically categorizes to help you set your spending targets. You can also set and prioritize your own transaction categorization rules.

- **Intraday price updates on a 20-minute delay for investment accounts** when you log into your site or manually request a price update for an individual account.

- **Interactive Investments with fully integrated "research" data and drilldowns / filtering** allowing you to select your own view for your investment accounts.

- **A redesigned Vault** with new functions such as Search, Drag and Drop and keyword tagging. There are also new private folders for storing "Birth Certificates," "Children's Documents," "Family Information," and "Passports".

- Access to **Reports and Awards** tracking.

Seminar Update

As previously mentioned, our newly developed seminars on **Comprehensive Financial Planning and Social Security Benefits** continue to be extremely well received. Thus far, I have conducted 7 seminars, 3 more are scheduled, and 4 more are under consideration.

The presentation is completely focused on Planning Issues in the event of Retirement, Incapacity and Premature Death including an explanation of the role Social Security Benefits plays in each of these contingencies.

If you would like to discuss them with me and/or consider hosting one, please let me know.

Conclusion

As always, thank you for the continued opportunity to be of service, and please let me know if you have any issues we should discuss.

Best regards,

Robert E. Tucker, CLU
Chartered Financial Consultant

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