
Phase III
Advisory
Services

1110 Lake Cook Road

Suite 265 • Buffalo Grove, IL 60089

708/520-5545

A Registered Investment Advisory Firm

July 17, 1995

Ms. Kathleen Peterson
Equinox Consulting
7618 West Madison Street
Niles, IL 60714-2540

Dear Kathleen:

Just wanted to drop you a quick note to thank you for your great help in bringing more organization to my practice. I am still using the system that you helped me implement. I had a few of the elements in place, but you really helped bring everything together.

This last year has been full of new business and numerous projects. I could not have kept as good of a handle on everything as I did, without the following system that you helped me put together. I have to admit, I still have a ton of papers on my desk, and have realized the main road block for me at this point in time, is that I am under staffed, and trying to do too much myself. I am currently addressing that problem, and looking forward to freeing my desk and my time, over the next several months.

Thanks once again.

Kindest regards,



John W. Bever, CFP

JWB:jah