Lund Financial Group
Your dreams & ambitions; our coordinated strategies...executed

August 1, 2006

Dear Client,

Summer
It's the middle of summer—a time where you can steal a relaxing moment and reflect on how your year is going. Hopefully you are enjoying time with your family and feeling pride at what you have accomplished so far. As a financial planner, I spend a good amount of time reviewing my own progress against the goals we've set for me, my family, my business and, of course, my clients. This is my chance to update you on what has been happening with Lund Financial Group since the firm was officially founded in November, 2005.

Many of you have been in to see me to review your education and retirement plans. We reviewed your retirement savings plans and investments to ensure you are on track with meeting your goals and objectives. Many have also used this opportunity to update your estate planning, working with my associate, Chris Duffy, from my Quincy office. Attorney Chris Duffy provides comprehensive estate planning, and document creation of Wills, Durable Powers of Attorney, Healthcare Proxies and Trusts.

If you haven't been in to see me, my main office is located in Mansfield, with a satellite office in Quincy. The majority of my time is spent in Mansfield, where my office is easily accessible to both routes 95 and 495.

What's New
This past spring, I continued my lecture series and will be speaking in the fall at approximately 10 venues on education, retirement and long-term care planning issues.

I joined the TriTown Chamber of Commerce, which represents Mansfield, Foxboro and Norton. You may have seen my writings on various financial topics, and my interviews and quotations in several financial publications. You can see me again soon in articles in Fidelity Magazine, Best Life and the Journal of Financial Planning.

A new reporting system is now available to you. This quarterly report provides a single, comprehensive wealth management report for clients with multiple investments accounts. Not just balance and transaction history, but a review of each part of your portfolio with benchmarks for comparing your own performance.

Work has begun on the creation of the Lund Financial Group website, www.lundfg.com. This site will provide information about the firm, the type of clients we work with and the range of services we can provide. Existing clients will be able to access a password protected portal where you can retrieve your financial plan information from our MoneyGuidePro software, as well as access your own comprehensive investment reports.

20 Cabot Boulevard, Suite 300 • Mansfield, MA 02048 • (508) 618-1262 • chris@lundfg.com
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Choice
You have a choice with whom you entrust your financial future, and I thank you for continuing to work with me and my firm. We remain committed to providing friendly, comprehensive plans, service and advice, and look forward to a bright future together.

Often my clients ask me to speak with one of their friends or colleagues about Comprehensive Financial Planning and Private Asset Management. They honor me with this privilege, and I am happy to accommodate. Our standards are clear and simple.

First, *confidentiality* is the cornerstone of my practice. Each of my client relationships is absolutely confidential. Period.

Second, *thoughtful and courteous service* is guaranteed. People and relationships are our business.

Finally, *I will never give advice or counsel a client before thoroughly understanding his or her needs*.

My commitment remains…
Continuing to grow the business at a reasonable rate while remaining fair to existing clients; maintaining excellent relationships with all my clients; providing the same high levels of service while keeping a healthy balance with my family and community involvement.

Best Regards,

Christopher Lund, MBA, CFP®, CLTC

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