



John P. Barton, MSW, CFP®
889 N. Maize Road, Suite 112, Wichita, KS 67212-4559
Phone: (316) 773-0007 | Fax: (316) 721-2898 | www.CenterPointeWealth.com

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Dear Friends,

After twenty-five years of serving clients and providing integrated financial advisory services, I am delighted to celebrate this wonderful anniversary and announce our new beginning with you. As you've probably noticed by now, we have developed a fresh new identity focused around what we do, namely creating Prosperity for Life for our clients.

We are very proud of our new name, stationery materials and Web site because they put the spotlight on you. You are the center of our work together. You are the point of everything we do. Our new marketing materials help us communicate our dedication to serving each client in the most appropriate and meaningful way for them.

One doesn't get the privilege of celebrating a milestone like 25 years in the financial services business without a loyal client base. In fact recent statistics* indicated that only 31% of advisors remain in the business for more than 21 years. I want to acknowledge and thank all my clients for giving me the opportunity to serve. My goal is to develop deep, long-term relationships — the kind of relationships that allow clients to share important circumstances and dreams — things shared between good friends. Trust is paramount in my work. And I am lucky to work with so many good and loyal friends.

Check out our new brochure and business cards. I've included an extra, hoping you will share it with a friend. Also, be sure to visit our new Web site, www.CenterPointeWealth.com. Check out The Good Life page, financial planning articles, calculators and helpful links. I am confident that you will be impressed.

Thanks for a great first twenty-five years. I remain committed and will stand by my clients during and through life's many transitions. Thanks for standing by me as well. Let me know what you think of our new look!

Sincerely,

John Barton, MSW, CFP®
Wealth Advisor

* The 2006 Financial Advisor Symposium