



Enclosed you will find the following items:

- FBB Capital Partners' Initial Consultation Checklist
- Three quarterly "Market Update" letters
- FBB Capital Partners' Form ADV Part 2A: Firm Brochure
- FBB Capital Partners' Form ADV Part 2B: Brochure Supplement
- FBB Capital Partners' Investment Management Agreement
- FBB Capital Partners' Privacy Pledge

Directions and Parking:

We are located at 127 N. Washington Street in downtown Easton.

Please feel free to park in our parking lot on N. West Street, one block west of N. Washington Street, between 114 N. West Street and 120 N. West Street. If you are coming from Bay Street, the parking lot will be on the left, just beyond 120 N. West Street and before 114 N. West Street. If you are coming from Port Street, the parking lot will be on the right, just beyond 114 N. West Street. Please drive to the rear of the parking lot. Our spaces are located on the far left-hand side of the lot and are marked with signs that read "FBB Capital Partners." Our building is a two-story yellow building in the rear left-hand side of the parking lot.

For additional information about FBB Capital Partners, please visit our website, www.fbbcapitalpartners.com, or contact us by telephone at 410-822-0813.



FBB Capital Partners' Initial Consultation Checklist

Please bring the following items to your first meeting:

- Copies of statements for all brokerage, retirement, and savings accounts
- Social Security and/or other pension benefit statements
- Recent statements related to any outstanding debt (mortgage(s), credit card(s), etc.)
- Copies of recent paystubs
- Copy of your most recent tax return
- Estimate of your current monthly savings and expenses
- Legal Documents (Wills/Trusts/Powers of Attorney)