



COMPASS
PLANNING ASSOCIATES

Fee-Only Financial and Investment Planning

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On Course - Special Edition

March 16, 2020

Hi Everyone,

Covid-19 has temporarily changed our work day, but it hasn't changed our commitment to helping you reach your financial goals.



We're moving all our meetings online, and dividing our staff between two offices and their homes as a social distancing measure. We're used to working remotely (in fact, we have many clients outside of MA) so we don't expect this change to reduce the effectiveness of our service.

Zoom is an easy to use online meeting service. You'll be able to log into your meeting using your computer, a phone or tablet, or even a landline phone. We'll send you an email with links and dial-in numbers as your meeting approaches. Your meeting notes will be available in your [Sharefile](#) vault. Beth, Sharry, Theresa or Josh will send you a link when your docs are ready.

Thank you!
Please let us know if you have any questions.

Jennifer Lane, CFP



Compass Planning Associates helps families, individuals, and small-business clients achieve financial security, knowledge, and control over their money. Our **fee-only, client-centered approach** provides education and guidance for achieving financial goals and dreams.

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