

6/22/2016

To: Whom it May Concern
From: Robert and Phyllis Wilson, Sun City, AZ
Re: Letter of Recommendation, Dr. Harold Wong

Our acquaintance with Dr. Harold Wong began in the Spring of 2012 after seeing an advertisement in a local West area newspaper for an investment seminar at the Golden Corral. We had become disenchanted with the way our investments were performing in the stock market so decided that even if we didn't like what we heard, we would at least have lunch. We were pleasantly surprised by what we heard and decided to stay longer just to talk with Dr. Wong. Because of our ages, we felt we needed to be invested in something more stable and something that would provide us with additional income should we have need so made an appointment to meet him at a later date.

Dr. Wong had already gathered some financial information from us prior to our first meeting and came prepared to help us make a good decision regarding our future. Dr. Wong is never too busy to listen and never rushes anyone to make a decision just to get a sale. He is thorough and thinks things through before making any suggestions. He spends time making sure you understand prior to making any kind of investment.

He evaluated our situation and suggested we invest in two annuities, one from personal funds and the other an IRA. Because of the advice he gave, we have yet to make any withdrawals from the two annuities which has certainly benefitted us. He also was very cautious in how the annuities were written and we felt he was very committed to preserving our personal assets.

In all of our years of doing business with various banks, stock brokers and credit unions, we are of the opinion that we should have met him earlier in our lives. Of course, we didn't live in the area but we feel someone with his knowledge and honesty could have helped us achieve our goals in much less time.

During these past 4 years, we have been invited to a number of very informative seminars that Dr. Wong has led throughout the Valley. We feel we learned a lot about investments from attending those seminars and would suggest that if you have the opportunity to attend, you should take advantage. He is very approachable and has the ability to make you feel that every question you have is of value and needs to be answered.

Perhaps Dr. Wong's strongest attribute is his determination to make sure you have as much information as possible to make a sound investment. He speaks in a language a layman can understand and is diligent in gathering whatever data is needed for you to make an educated decision. It is for these reasons that we highly recommend him for your investments.




