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Dear Justin:

I want to tell you a story...

About eight years ago, Tom determined that we needed to update our financial and estate plans. After careful consideration, we chose a wealth management firm in Boulder (Agile) and after several interviews with estate attorneys – you - as the attorney to handle our legal needs. Tom said, “he is so *over the top* with his passion for estate law that I don’t need to be!” Thus began our relationship with you, Judy, Suzanne and LifeSpan.

After attending the first of your workshops, I vowed I would never spend three hours doing that again! I didn’t understand the complexity of the issues, the important nuances of funding, and I found the mere idea of dealing with end-of-life thoughts thoroughly distasteful. I complained loudly. But Tom said, “you don’t have to *like* coming, you just *have* to come. It’s important.”

A word about Tom, my husband of 43 years, is appropriate here. Always the engineer, he paid meticulous attention to detail. He researched and analyzed every decision he made in our behalf. He would discuss these matters with me to the degree that I was willing to listen – but a quick overview was fine with me. As our three daughters would say after a reminder to get an oil change, fund their Roth IRAs, or review their current insurance needs, “Dad always worries about the *geek* stuff!”

But, in spite of my reluctance, I did attend numerous workshops. I began to understand what’s in the Supermarket vs. the Parking Lot, and the impact a School Bus can make, but must confess, I *do* still puzzle over the Werewolf! I came to appreciate the importance of transferring *wisdom* along with wealth and why and how *we want to give what we have to whom we want when we want and the way we want* – and how to go about it. And thus our relationship continued to flourish.

But then, almost a year ago, the unthinkable happened. My tall, slender, healthy, former marathon runner husband died suddenly of a heart attack. He took no meds and had no symptoms; his blood pressure was normal; and his 160 total cholesterol was, as I said, without the aid of medication. He had taken his six-mile daily walk the day he died. The shock and sorrow of this loss are still incomprehensible. He knew everything, he took care of everything, he was so healthy – how could this happen? How could my life go on?

But life is relentless and it *does* go on, even for the sorely wounded. There was much to be done and in his wisdom, Tom had amazing people in place to help me. The financial and estate decisions that needed to be made got made and what needed to be implemented got done without a hitch. Justin, you made the confusing understandable, you took whatever time it took to help me fathom the unfathomable and you made an *unreasonable commitment* to bring to fruition all that needed to be accomplished.

I came to trust your professionalism, integrity, and competence completely. Together we got through it... I hold you in the highest esteem and wanted you to know why.

Sincerely,


Anne 