

Faith, Inspiration & Leadership

Letter to Clients & Friends on 9.12.01

By Steve Saenz

September 12, 2001

To Our Clients and Friends in the Investment Industry:

It seems trite to write about the disturbing and tragic events we all witnessed yesterday. Nevertheless, I would like to offer some thoughts and ideas that may help you in some small way.

If you are reading this message, you are undoubtedly a man or woman of considerable strength. You found your way into the investment business because you are intelligent, optimistic and able to inspire others. Given that you were blessed with these gifts, it occurs to me that your friends, family, clients and colleagues need you more than ever right now.

If I may offer three words that will help you get through this, they are: Faith, Inspiration and Leadership. More than anything, you need to have FAITH right now. You need to have faith in yourself, your family and your friends. You need to have faith in your institutions and in your country. Most importantly, you need to have faith in your Creator, whoever or whatever you perceive that to be.

If you have FAITH, you will INSPIRE the people around you. You will be a lighthouse for the many people who depend on you for advice and guidance. Without it, they won't be able to see you.

If you INSPIRE the people around you, you will LEAD them through this. You will lead them through the emotional trauma they will experience in the weeks and months ahead. You will lead them through the difficult decisions they will have or be tempted to make, including investment decisions. You will lead them to do the right thing.

When the current darkness turns into daylight, you will probably feel drained. This is normal when you run on adrenaline for an extended period of time. At that point, you can take some time to regroup. For now, take good care of your body, your mind and your spirit. This more than anything, will give you the energy and staying power you need to get through this.

Attached are two documents you may find helpful. The first contains some quotes about FAITH you can use to INSPIRE the people around you. The other is a letter you can send to your clients. Please feel free to adapt both to your business and pass them along to anyone who can use them. I would NOT recommend sending the letter to KEY clients. If you decide to implement one or more of the strategies described in this letter, you should CALL your key clients and personally tell them about your new initiatives. The main objectives of using the letter are to:

1. IMPROVE your client COMMUNICATION if it's anything less than exceptional.
2. FOCUS on and TALK about OPPORTUNITIES! You will find many smart people (with cash) out there who need and want guidance on how to CAPITALIZE on this situation. Your mission: Find them!

Please know that our thoughts and prayers are with you during this difficult time. As always, your comments and questions are welcomed.

Respectfully,
Stephen A. Saenz, President
Paragon Resources, Inc.

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Where faith is there is courage, there is fortitude; there is steadfastness and strength. Faith bestows that sublime courage that rises superior to the troubles and disappointments of life, that acknowledges no defeat except as a step to victory; that is strong to endure, patient to wait and energetic to struggle. Light up, then, the lamp of faith in your heart. It will lead you safely through the mists of doubt and the black darkness of despair; along the narrow, thorny ways of sickness and sorrow, and over the treacherous places of temptation and uncertainty.

— *James Allen*

That day which you fear as being the end of all things is the birthday of your eternity. —

Seneca

The whole course of things goes to teach us faith. We need only obey. There is guidance for each of us, and by lowly listening we shall hear the right word. Place yourself in the middle of the stream of power and wisdom, which flows into you as life. Place yourself in the full center of that flood, then you are without effort impelled to truth, to right and perfect contentment. — *Ralph Waldo Emerson*

Do not grudge your brother his rest. He has at last become free, safe and immortal, and ranges joyous through the boundless heavens; he has left this low-lying region and has soared upwards to that place which receives in its happy bosom the souls set free from the chains of matter. Your brother has not lost the light of day, but has obtained a more enduring light. He has not left us, but gone on before. — *Seneca*

My peace I give unto you. Let not your heart be troubled, neither let it be afraid. — *John 14:27*

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[Insert date]

Dear [Client Name]

The past 18 months have tested the fortitude of even the most experienced investors and the events of this week have shaken the very foundation of our nation. While no one knows for sure when or where the market will bottom, we feel it is time to start looking for investment opportunities with an eye toward making new commitments over the next 6 to 12 months. Toward this end, we are implementing three initiatives that will keep you better informed about new opportunities as we uncover them:

1. **Weekly Briefings** — these informal meetings will be held in our office at [insert address] **every [insert day and time]**. The purpose of these meetings will be to assess current market conditions and discuss new opportunities. Please feel free to bring a friend or family member. Lunch will be served, so please call in advance and let us know you're coming.
2. **Monthly Executive Summaries** — these one-page executive summaries will be sent out BY E-MAIL at the beginning of each month. Purpose will be to review recent developments and discuss potential opportunities. If you would like to receive these summaries, please complete the form below.
3. **Office Consultations** — we are extending our business hours to accommodate evening consultations on [insert days of week you are willing to meet with clients in the evening]. If, at any time, you would like to come in personally to discuss your specific situation, please call [insert contact name] at [insert telephone number] to schedule an appointment.

We appreciate your business and look forward to hearing from you.

Sincerely,

[Insert your name]

Monthly Executive Summary Request Form

Please send me your Monthly Executive Summary (E-mail)

Name: _____

E-mail address: _____

Please mail completed form to: [insert your mailing address]