



JAE HOON LEE, C.P.A.  
BENJAMIN BANG-GULL LEE, C.P.A.

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JONG YEUN LEE, C.P.A.  
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MATTHEW LEE, C.P.A.  
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January 21, 2019

Attn: CalCPA Board of Directors and Nominating Committee Members

Re: Kelly, Woo, CFP, Letter of Recommendation

To Whom It May Concerns:

It is with much enthusiasm that I recommend Kelly Woo as a nominee for the CalCPA Women to Watch Award.

Kelly and I have been working together in collaboration for a few years now. I first met her at my office where she introduced various services and expertise she offered. From the very start, her persona and attitude was bright and welcoming. I started with referring her one or two clients, and since then, that number is constantly growing. Hearing back from all my clients that Kelly treated them with genuine care and how she treated their flow of cash as though her own was incredibly refreshing and has considerably increased my confidence in her.

She provided my clients with financial planning, wealth management and tax reduction strategies. For me, as a CPA, this makes life easier. She plans accordingly, keeps me in communication and is in discussion with me about certain strategies that she wants to incorporate into their portfolio.

As complex as strategies may be, my clients are always sure to communicate how they appreciate the simplicity of the material she presents. Kelly breaks down complex ideas and simplifies them into a straightforward matter that makes it easy for clients to understand. Her analysis reports and quarterly account balances help her clients manage their accounts. I appreciate the quality of service that Kelly offers. I commend her for how she goes beyond to contemplate things from a client's perspective and make adjustments to make complex concepts effortlessly easy to follow and it is clear that her passion for her career is transcribed to the work she produces.

In deep appreciation of the dedication that she puts into her work and being such good example of what an ethical, highly qualified and caring financial adviser should be, I would like to highly recommend Kelly as a nominee for CalCPA's Women to Watch Award.

A handwritten signature in black ink, appearing to read 'Jae Hoon Lee', with a long horizontal flourish extending to the right.

Jae Hoon Lee, CPA  
Lee and Lee, CPAs