Financial Planning Form Letter

- If for some reason we are unable to give the client a physical copy of the packet, the President or other Advisor has the FP email it
  - The following email template is used for *CURRENT CLIENTS*.

Good Morning/Afternoon [NAME],

In order to begin your life plan analysis, please review and complete the attached *Confidential Profile*.

In addition to the profile, I will also need the following documents so we can begin working on your plan:

- Attached Confidential Client Profile
- Most recent statements for bank accounts, investment accounts, or retirement accounts [personal and employer-provided]
- Most recent statements for credit cards / mortgage / other loans
- Most recent statements and policies for any insurance contracts (life, long term care, disability, etc.) [personal and employer-provided]
- Any estate planning documents (wills, powers of attorney, etc.)
- Most recent pay stubs
- Annual social security statements [please visit https://www.ssa.gov/myaccount/ - you can create an account to receive your statement]
- Net worth statement
- Personal family budget / Spending plan
- Any other documents you believe will help us capture a comprehensive financial snapshot

I hope you have a wonderful day and I look forward to working with you!

- The following email template is used for *PROSPECTS*

Good [Morning/Afternoon] [NAME],

Thank You for reaching out to us.

We have you scheduled for an appointment on DAY, DATE at TIME am/pm.

Please review and complete the attached *Confidential Profile*. In addition to the profile, you may also want to bring the following documents for us to review:

- Attached Confidential Client Profile

- Most recent statements for bank accounts, investment accounts, or retirement accounts [personal and employer-provided]
- Most recent statements for credit cards / mortgage / other loans
- Most recent statements and policies for any insurance contracts (life, long term care, disability, etc.) [personal and employer-provided]
- Any estate planning documents (wills, powers of attorney, etc.)
- Most recent pay stubs
- Annual social security statements [please visit https://www.ssa.gov/myaccount/ - you can create an account to receive your statement]
- Net worth statement
- Personal family budget / Spending plan
- Any other documents you believe will help us capture a comprehensive financial snapshot

Please bring these documents with you to your meeting with David on [DATE]. The more information we can review, the more accurate the projections.

We look forward to meeting you!