Email Templates

MASON

Agenda Process Started

This is the email that the advisor receives to kickstart the agenda process.

1. Click here to add any additional details to the agenda before the meeting. If "Ready to send to client?" is marked as "No" you will receive a copy of this email each time the form is re-submitted.
2. Once the agenda is ready to be sent to the client(s), mark "Ready to send to client?" as "Yes" and indicate the desired send date.
3. Client(s) will receive a link to the form and will enter any additional discussion topics, life changes and other notes.
4. Once the client submits the form they will receive a confirmation email with a copy of the finalized agenda attached as a PDF. In addition, the advisor(s) and support will also receive a confirmation email with the finalized agenda attached as a PDF.
5. On the day of the SPM meeting, the advisor(s) and support will receive an email notification with a link to access the form and take notes during the meeting. At the top of the form there will be a link to a Google Drive upload of the agenda PDF. Note: You must be signed into Drive to access.
6. Once the form is submitted the notes will be saved. If "Ready to send final notes?" is marked as "No", the advisor(s) and support will receive a notification email with a link to return at a later time and finalize.
7. Once "ready to send final notes" is marked as "Yes", the client(s) will receive a final confirmation email. The advisor(s) and support will also receive a confirmation email and client-facing email + internal notes will be logged to Wealthbox.

Email Templates

MASON

Email Agenda Received

This is the email the client and the advisor receive when the agenda is complete (after client does their part).

<NAME>,

Thank you for your response. Attached you will find a PDF document containing your agenda for our Strategic Planning Meeting. If you need to update this agenda, please refer to the link provided in the previous email to return to the form to make any necessary changes.

Please upload the documents requested on the agenda and the documents listed on the Strategic Planning Meeting Prep Sheet to our ShareFile as soon as possible. If you are not comfortable with the upload process, you may also mail the documents to our office or fax them to 757-223-9990. If mailing, please indicate if you would like us to return the documents.

We understand that emergencies and rescheduling needs will occur. In the event that you need to reschedule, please contact Mason Support at 757-223-9898 or email Mason Support.

Sincerely,
John Mason, CFP®
Mason & Associates

Email Templates

MASON

Email to Client to Complete Agenda

This is the email the client receives 14 days in advance to do their part.

<NAME>,

We look forward to meeting with you <DATE> at <TIME>. In order to make the most of our time together, please complete this form to generate your Strategic Planning Meeting Agenda. Once you submit the form you will receive a confirmation email with a PDF copy of your agenda attached. If 2 or more email addresses received this email, only one of you must complete the form. If you realize after completing the agenda form that you missed something, feel free to use the link again to update the form and the agenda.

Please upload the documents requested on the agenda and the documents listed on the Strategic Planning Meeting Prep Sheet to our ShareFile as soon as possible. If you are not comfortable with the upload process, you may also mail the documents to our office or fax them to 757-223-9990. If mailing, please indicate if you would like us to return the documents.

We understand that emergencies and rescheduling needs will occur. In the event that you need to reschedule, please contact Mason Support at 757-223-9898 or email Mason Support.

Sincerely.
John Mason, CFP®
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