Getting Started - Email Template

**Instructions:**

For Advisors that have access to portals through a planning software or CRM.

* Send this email once the client has agreed to the services and the fee.
* Remove anything in **YELLOW** before sending the email to the client
* Update anything in **BLUE** before sending the email to the client
* Be sure to read through this and customize it to your systems
* Don’t forget to attach the workbook & document checklist!

Hello, Client & Client:

Below is the step-by-step guide to prepare for your financial plan.

**Step 1:**Data gathering

* Start collecting the documents from the attached Document Checklist and bring this information with you to the next meeting OR upload to The Vault>Shared Documents (eMoney) OR upload to your client portal
* Please securely connect your accounts to your personal planning website (delete if not applicable)
  + You can link the following accounts:
    - Bank accounts
    - Investment accounts
    - Debt (mortgage, credit cards, student loans, etc.)
    - And more
  + This is an important step to ensure we have updated information as we are creating and maintaining your plan

**Step 2:**Complete the Goals Workbook (attached)

* This is the goal envisioning document that allows you to dream a little and put your goals on paper.
* We will go through this workbook together during our next meeting

**Step 3:** Confirm payment frequency and payment method

* + Total Annual Fee for the consulting: Plan Fee
  + Frequency options: Monthly, Quarterly, Annually
  + Payment Methods: ACH, Credit/Debit Card, Check

**Step 4:** Sign Consulting Agreement – Add the details on how and when you will send this out (email, DocuSign, mail)

**Step 5:** Schedule the next meeting

* Once the above steps are complete, use this link to schedule: Add link here or indicate the process to schedule a meeting