1st Appointment Confirmation Note

Step 5

*Send the 1st Appointment Confirmation the day of or after the 1st Appointment being booked. Modify the parking instructions so they are accurate for your office location.*

*If you send email confirmations make sure you have the correct email address and use a standard Outlook Template for efficiency and consistency. You can include the map as an attachment.*

April 21, 2023

Name

Address

Address

Dear [Prospective New Client],

We enjoyed speaking with you the other day and wish to confirm our upcoming appointment:

Date:

Time:

Address:

As discussed, during this appointment we will have the chance to get to know more about each other.

We are going to share information with you about our practice and approach so you can determine if this is what you are looking for. And, we will be asking you to share information about your financial goals and expectations from an Advisor so we can determine if this is a good fit for our philosophy and approach.

For your convenience, we have enclosed a map showing you where our office is located. Client parking is available at [describe the parking location]. We are happy to provide one hour of complimentary parking.

If you have any questions, we can be reached at xxx-xxx-xxxx.

We look forward to meeting you.

Best Regards,

Advisor’s Name

Advisor’s Title