2nd Appointment Confirmation Letter

Step 9

*Send the 2nd Appointment Letter & Checklist about 2 weeks before the 2nd Appointment with your new client so they have enough time to receive it and begin pulling together the documentation you asked them to bring.*

April 25, 2023

Name

Address

Address

Dear [Client]:

**RE: Our Upcoming Appointment**

I enjoyed meeting you at our first meeting and I look forward to beginning the financial planning process with you.

Our next meeting has been confirmed as follows:

Date: [Date]

Time: [Start and end meeting time]

Address: [Location of meeting]

At our next meeting, we will complete a *Personal Financial Profile*. This profile will summarize your current financial situation and will be instrumental in helping us to decide which financial strategies will help you to achieve your goals.

To ensure we can proceed effectively, you will need to bring the required documents to this meeting. I have enclosed a checklist detailing the documents you will need to bring.

If you have any questions or if you need to contact me prior to your appointment, I can be reached at (xxx)-xxx-xxxx. I look forward to meeting with you again.

Sincerely,

Advisor’s Name

Advisor’s Title

Encl.