1st Appt. Rebranding Letter & Checklist

Step 4

*Send the 1st Appointment Letter & Checklist about 2 weeks before the 1st Appointment with your existing client so they have enough time to receive it and begin pulling together any documentation you’ve asked them to bring.*

*To simplify this process, use the same checklist you’ve chosen for your New Client Process.*

May 5, 2023

Name

Address

Address

Dear [Client]:

**RE: Our Upcoming Appointment**

We look forward to our upcoming meeting with you. As [ASSISTANT] mentioned to you on the phone, we will be reviewing some updates we have made to our planning process.

At this appointment, we will update your *Personal Financial Profile*. This profile will summarize your current financial situation and will highlight the financial strategies we are working on to help you achieve your goals.

So that we can proceed effectively, please bring the documents listed on the enclosed checklist.

Otherwise, we are confirmed for our upcoming meeting as follows:

Date: [Date]

Time: [Start and end meeting time]

Address: [Location of meeting]

I look forward to seeing you.

Sincerely,

Advisor Name

Advisor Title

Encl.