After Review – Sample Follow-up Email Template

For Qualified Client or Prospect

Dear Mr and Mrs Client

It was a pleasure meeting with you this morning and hearing that you and your family are doing well. I wanted to provide you with a summary of our meeting and next steps.

1. Perspective

- Please find below links to <<Insert links and names of client-approved market perspective podcasts and videos.>> I think you'll find these informative and a reliable source of on-going perspective about world events and market developments.

2. Review of your Priorities

- Please find attached your revised customized roadmap that now incorporates the following changes we discussed:

    1.

    2.

    3.

3. Plan and Portfolio Review

- We reviewed the plan and although your priorities have changed as above, there, is no need to make any significant changes to your plan at this time. We will however, continue to monitor and update as needed.

Or

- We reviewed the plan and will begin making the needed updates and revisions. We will keep you informed as each part of the implementation plan is complete.

Or

- We reviewed the plan and understand your priorities remain consistent with our initial plan, we will stay the course for now, but continue to monitor and update as needed.

4. Next Meeting

- In preparation for our next meeting, please review (attachment) or please send in (requested materials or information)

Thank you again for your time today and I look forward to speaking with you at our next meeting, scheduled for <<insert date and time>>. I will provide you with the Zoom link and dial in information separately. In the meantime, if you have any further questions, concerns or need to inform me of any changes to your circumstances, please do not hesitate to contact me directly at 555 555 5555 or via email at advisor@firm.com .

Kind regards,
Advisor name

After Review – Sample Follow-up Email Template

For Non Qualified Client or Prospect

Dear Mr. and Mrs. Client

It was a pleasure meeting with you this morning and hearing that you and your family are doing well. I wanted to provide you with a summary of our meeting and next steps.

1. Perspective

- Please find below links to <<Insert links and names of client-approved market perspective podcasts and videos.>> I think you'll find these informative and a reliable source of on-going perspective about world events and market developments.

2. Review of priorities and Portfolio Review

- We reviewed the plan and although your priorities have changed as above, there, is no need to make any significant changes to your plan at this time. We will however, continue to monitor and update as needed.

Or

- We reviewed the plan and will begin making the needed updates and revisions as agreed.

Or

- We reviewed the plan and understand your priorities remain consistent with our initial plan, we will stay the course for now, but continue to monitor and update as needed.

If you have any further questions, concerns or need to inform me of any changes to your circumstances, please do not hesitate to contact me directly at 555 555 5555 or via email at advisor@firm.com .

Kind regards,

Advisor name

IMPORTANT INFORMATION

Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

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