

2nd Meeting Email Confirmation Script #1

Dear Client,

Hope all is well.

I wanted to begin the process of getting you scheduled for your second meeting. I have provided you with a list of documents needed for your second appointment along with our planning questionnaire. We will need these at least 3 business days prior to your meeting. You can send back by fax, email or you can drop them off and we will gladly make copies for you.

In the meantime, here are some dates and times that are available on (advisors’) calendar.

Please let me know if you have any questions.

(Administrative Assistant)