Dear Clients first name,

I enjoyed our meeting today, and I’m pleased that we’ve decided to move ahead on our work in helping you achieve all that is important to you.

As I mentioned during our meeting, over the next several weeks you will receive various documents that are related to the account openings and transfers that we conducted today. Please bring this paperwork to our next meeting, where we will get it all organized for you.

Also, I wanted to thank you for introducing prospective clients name. I will give him/her a call tomorrow to explore whether there is a basis for us providing him/her with a second opinion on his/her finances. I’ll be sure to let you know the outcome.

I look forward to our next meeting, which we have scheduled for day,date, at time. Expect that meeting to take about an hour.

As always, if you have any questions that I can answer before that time, please don’t hesitate to contact me.

Sincerely,

Jack Gelnak