Dear Prospective clients first name,

I enjoyed meeting again with you today. I believe that the investment plan we presented to you will be very useful in helping you to achieve your most important financial goals. Please take some time to review the plan and note any questions you may have.

As we discussed, our next step is the Mutual Commitment Meeting, when we will both decide whether it makes sense to work together. If it does, we will begin to implement your investment plan to maximize the probability of achieving all that’s important to you.

I look forward to this meeting, which we have scheduled for day, date, time. Plan on the meeting lasting about an hour.

If you have any questions that I may answer before that time, please don’t hesitate to contact me.

Sincerely,

Jack Gelnak