Dear Clients First name,

I’m glad that we had the opportunity today to get your new account paperwork organized. As I mentioned at our meeting, you will continue to receive documentation on a regular basis. If you’d like our help in organizing this paperwork, feel free to bring it in to our Regular Progress Meetings so that we can assist you in keeping it organized.

I look forward to our first Regular Progress Meeting, which we scheduled for day,date, time. Expect this meeting to take about an hour.

As we discussed today, we will present our advanced plan to you at this meeting. Should you choose to implement the recommendations in the plan, we will make the plan the third part of your overall wealth management plan. Together with your investment plan and investment policy statement, the advanced plan will serve as our road map as we move ahead in addressing your most important financial concerns.

In the meantime, if you have any questions or concerns that I can address, please do not hesitate to contact me.

Sincerely,

Jack Gelnak