

# GREEN SCREEN: WORKSHOP SERIES 3

## Pre First Appointment : Workshop

Hey, It's [NAME] here. We're excited that you scheduled an appointment to see us after attending our workshop.

We wanted to take a moment before our meeting and let you know what to expect. This is an initial planning meeting. A time where you can express your concerns, ask your questions and bring us into your financial story.

This is also a time for you to get to know us and how we serve the individuals and families we work with. You will also find in this email a link to our Investor Profile Questionnaire and items that you can provide to make the most of our time together.

Take care and we'll see you soon.

## Pre First Appointment : General

Hey, It's [NAME] here. We're excited that you scheduled an appointment to see us.

We wanted to take a moment before our meeting and let you know what to expect. This is an initial planning meeting. A time where you can express your concerns, ask your questions and bring us into your financial story.

This is also a time for you to get to know us and how we serve the individuals and families we work with. You will also find in this email a link to our Investor Profile Questionnaire and items that you can provide to make the most of our time together.

Take care and we'll see you soon.

## Post First Appointment

It was a pleasure to meet you and learn more about you and your story. As you experienced in our first meeting, serving you is our top priority. It's our desire to craft a unique financial plan that works best for you. Our goal is to ; Invest in you, Be a resource for you and work for you, to ensure you get to where you want to be. We are excited to meet together again on your second appointment, where we will dive deeper into options we've customized specifically for you. Thanks again, and we look forward to seeing you soon.

