Meeting Recap Email

SUBJECT: **NAME** Meeting Recap **MTG DATE**

Body:

Hi CLIENT NAME –

It was great to **meet/speak** with you **(today). Make a personal comment (e.g. "I'm glad to hear you'll be able to soak up some sun in Florida soon").**

Here's a recap of our conversation **(minimum of 3 bullet points)**:
- Your investments have done well in the last **(timeframe), specific comment about $$ gained in timeframe, more recent loss, or about individual position. If any decisions made about an investment write it here.**
- You signed **(if they signed any document, list it here, whether a Trusted contact, AMA, EFT, or distribution)** form today.
- You mentioned **(opportunity they brought up that you will eventually want to circle back to… more money to invest, potential inheritance, looking at insurance, etc)**
- **Additional comments about the meeting such as "You do not anticipate needing money in the next 6 months from your investment." Or "We discussed at length the decision for you to transfer your mother to a nursing home and how that will impact her finances, and potentially yours." – show the client you listened to specifics of the conversation.**

Your Homework:
- **If nothing, "Have a great summer"**
- **Detail anything they are supposed to get back to us and to whom they should send it. "Call our office and speak with Evelyn or Rachel to give your Social Security number and drivers license" "Look for an email from no-reply@kestrafinancial.com in the next 3 days (don't forget to check your spam folder) to sign the paperwork we discussed."**

Pleasant Wealth's Homework **(write as much detail as possible, worded as if you are giving the specific instruction to admin support)**:
- Distribution requested **(e.g. Send you $10,000 Net, with 15% Fed w/h, 5% state)**
- **Anything you promised here** ☺

At Our Next Meeting:
Our next meeting should be in **(month). (IF A or B client, give them the link to do it right away)** We'll review your investments as it pertains to **(something you talked about in your meeting today).** We'll take next steps on _____. We'll further discuss _____.

If you have any additions or edits to the above, feel free to respond to this email. Otherwise, I'll look forward to seeing you in (**Month**)!

Best,