

Sample Follow Up IQ email

Hi Sample Client,

Thank you for taking the time to complete the Investor Questionnaire.

Based on the information you provided, how confident are you about meeting your financial goals?

Is your confidence at 50%? 75%? 95%? Or is it... "I have no idea!"

Far too often, investing is completely disconnected from your life goals. In our process, it's all one and the same. We synchronize life, financial, and investment planning to help you stay on track with your goals throughout every stage of your life.



The information you provided will help me guide you with clarity and confidence through the these three important steps.

I will contact you to set an appointment where we will build on the conversation you began by completing the questionnaire. When we meet, I'll introduce you to your personal Comfort Zone® that shows you how confident and comfortable you can be in your financial future.



Thank you,

Alicia Advisor

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