

Sample Template: Investor

Dear [\[Client's Name\]](#),

Our next review is around the corner!

To ensure we use our time most efficiently in our upcoming meeting, it would help to make sure that all your account **connections** are up-to-date and working properly. These connections are a key component of your financial plan that affect everything from spending needs to goal planning, and contribute to the accuracy of every report we create.

If there is a problem with any of your connections, there will be a small triangle icon next to the broken connection to alert you. You can fix the connection by either clicking the triangle icon or clicking into the *Connections* tab and manually locating the broken connection. You will then be prompted to re-enter your password and any other credentials in order to re-establish the connection.

If you have any questions in the meantime, feel free to give me a call. Otherwise, we look forward to speaking with you soon!

[\[Site URL\]](#)

Sincerely,

[\[Financial Professional's Name\]](#)