

Sample Template: Investor

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

Financial planning is more than knowing how to invest—it's understanding your goals, needs, and priorities at each stage of your life. By partnering with a financial professional, we can determine the goals to help you achieve your dreams—not just add to your 401(k).

[This training guide](#) will walk you through utilizing the **Goals** feature available in your Personal Financial Website.

[eMoney note: Access the URL for this guide by going to [Help > Client-Facing section > Goals \(Client-Facing User Guide\)](#)].

The goal tracking tool allows you to **analyze and monitor progress of your financial goals in real time**. You can easily add, personalize, and track your financial goals — including the ability to earmark which accounts you want to use to fund your goals and visualize how funding will grow over time. Let's begin!

[\[Site URL\]](#)

Sincerely,

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