

## ***Sample Template: Investor***

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

I wanted to check in to see how you're enjoying your Personal Financial Website. Hopefully you've found value in the consolidated financial information available to you.

But if you need some help getting started or making the most of your site, I encourage you to take advantage of your ***Help menu***, found in the top-right corner of your Personal Financial Website.

You'll also notice that each page on your website will have different resources available in your *Help* menu. For example, if you are on the *Investments* page, click *Help*, and you'll see all applicable resources to that section.

And the best part? You can access these in-depth educational resources at any time!

Take a few moments to explore your resources by clicking the *Help* link. Of course, if you have additional questions feel free to reach out.

[\[Site URL\]](#)

Sincerely,

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