

Sample Template: Investor

Dear [Client's Name],

Want to see a complete view of your financial well-being, in one place? Look no further than the homepage of your Personal Financial Website.

There, you can monitor activity in your financial accounts, check your net worth, and keep tabs on your spending and budgeting habits, all at-a-glance. And with intuitive navigation and access to a helpful video tour of the site—you'll be up and running in no time!

See for yourself and log in today!

[\[Insert Site URL\]](#)

And check out this [Personal Financial Website Overview Guide](#) to orient yourself.

[eMoney note: Access the URL for this guide by going to *Help > Client-Facing* section > *Personal Financial Website Overview with Workshop (Client-Facing User Guide)*].

Best wishes,

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