

Sample Template: Investor

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

We believe that telling a story you can relate to is much more effective than merely running through spreadsheets in our meetings.

The **Cash Flow Overview** shows us a holistic view of your income sources, withdrawals, and expenses, so we can see the complete story of your finances—including where you stand and how long assets will last.

To support us in having a meaningful conversation about your financial picture, it's important to understand your *Spending and Budgeting* tools available in your Personal Financial Website.

[This training guide](#) walks you through how to utilize your *Spending and Budgeting* tools, which will allow you to build out monthly spending budgets while also tracking spending habits on your connected transactional accounts.

[eMoney note: Access the URL for this guide by going to *Help > Client-Facing* section > *Spending and Budgeting Overview*.]

[\[Site URL\]](#)

Sincerely,

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