

Sample Template: Investor

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

As you know, we have a dedicated team working to ensure your portfolio is well diversified. But do you want to stay up-to-date on your latest investment information in between our meetings?

Your Personal Financial Website lets you **check up on your investments' progress easily**, and in real time, so you can see, 24/7, how they're impacting your financial picture.

To help you manage your wealth and monitor all of your accounts through a single, consolidated experience, the list of account types included within the *Investments* view of your website has recently been expanded.

Take a look at your *Investments* page on your personal financial website today, and review this [Investment Classification PDF](#) for help determining investment classification.

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

Log in and start managing your financial future today:

[\[Site URL\]](#)

Sincerely,

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