

Sample Template: Investor

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

Not sure how to begin setting up your Personal Financial Website?

Your **Organizer** makes the process simple and clear, and helps you keep your financial priorities, well, organized! Use the Organizer to group all your financial information in one place. The information entered here will be used to populate other areas of the application, including the homepage.

Here is an [Organizer Overview](#) to help you get started.

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

So log in and start managing your financial future today.

[\[Site URL\]](#)

Best wishes,

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