

Sample Template: Investor

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

We're looking forward to speaking with you at our upcoming meeting!

Before we get together to [\[purpose of upcoming meeting\]](#), I wanted to give you a brief introduction of what to expect from our planning session.

At [\[firm name\]](#), we believe collaboration is essential to the planning process. But meeting in person may not always be possible. With our state-of-the-art and interactive screen-sharing capability available through your Personal Financial Website, you'll have the flexibility to connect with us from wherever you are.

Here is a short [Screen Sharing User Guide](#) that provides screenshots and step-by-step directions to ensure a smooth experience for our upcoming meeting. *[eMoney note: Access the URL for this guide by going to [Help > Client-Facing section > Screen Sharing \(Client-Facing User Guide\)](#).]*

[\[Site URL\]](#)

Sincerely,

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