***Subject Line: How to Safely Store Your Important Files***

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]