Subject line option 1: I’m available to answer your questions

Subject line option 2: Would you like to schedule a virtual meeting?

Dear **[Client Name],**

As your trusted financial professional, I’d like to check in with you and your family during these turbulent times.

Providing outstanding service is something I take seriously, which is why I’m offering to meet virtually to review your financial situation and answer any questions you may have.

I am currently scheduling my appointments for the next two weeks. I am holding my appointments online using preferred meeting platforms – and you can join me from any computer, tablet, or smart phone.

*NOTE: Before getting started with an application, you should check the tech/IT requirements of your organization.*

If you would like to schedule an appointment, please reply with a date and time that will work for you from the options below [or click on the time trade link]:

Date/times

I will then confirm your appointment and will include a link to our virtual meeting.

As always, thank you for your business and for your trust.

Sincerely,

**[Rep Signature]**

EGEN-2060 (4/2020)