

Email Templates

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● ● ● Tax Letter

Dear [Client],

One of the reasons you hire us is for proactive tax planning to reduce your lifetime tax bill. While we don't prepare your tax return, we want to help you pay less because every dollar we can save you in taxes is another dollar you have to fund your goals. Sometimes paying less is as simple as ensuring your return is prepared correctly!

It can be easy to miss a form if you didn't know you were supposed to receive it. Even though the IRS already knows what is on the forms you are supposed to file, they hold you responsible for filing them. As such, we are providing the attached guide to aid in your tax preparation to ensure accurate reporting. It will reflect the tax documents you can expect as a result of having investment accounts.

Let us know if you have any questions or if we can be of further assistance during this tax season.

Best regards,

<<Signature>>



QUARRY HILL

Kyle Moore

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● ● ● Spring Data Gathering

Hi [Client],

We are looking forward to seeing you during our upcoming spring meeting season between March 22nd-May 12th. We will be emailing a scheduling link in mid-February.

During your spring meeting we plan to review:

- Your Financial Foundations (cash reserve, cash flow, and debt)
- Investment Review
- Retirement Projection
- *Please email us with any additional agenda items you would like to discuss*

In order for us to best prepare for your meeting, we have created a list of needed information in your [Right Capital client portal](#). Right Capital will begin sending automated reminders to provide the needed documents to you beginning tomorrow. For those of you just becoming acquainted with Right Capital, we've included [a brief video describing where you can locate your tasks in your dashboard](#).

If you'd like to mail your documents to us, let us know and we would be happy to send you a prepaid envelope. We would appreciate receiving the requested information no later than February 28th so we have adequate time to fully prepare for your spring meeting.

We thank you in advance for your trust. Please know we take your privacy seriously and [are committed to protecting it](#).

Let us know if you have any questions. We are excited to see you soon!

Warmest regards,
<<Signature>>

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● ● ● Spring Scheduling

Hello Quarry Hill Clients!

We hope you are well! We will be conducting client review meetings in the spring, and we would love to meet with you if your schedule allows.

Spring meetings will be held from March 22nd through May 12th.

Please [CLICK HERE](#) to schedule your spring meeting.

During your spring meeting we plan to review:

- Your Financial Foundations (cash reserve, cash flow, and debt)
- Investment Review
- Retirement Projection
- *Please email us with any additional agenda items you would like to discuss*

We are looking forward to seeing you soon!

Best,
<<Signature>>

● ● ● Spring Scheduling Reminder

Hi [Client],

We are following up with a reminder to schedule your spring meeting. You can [CLICK HERE](#) to schedule your spring meeting.

Spring meetings will be held from March 22nd through May 12th.

During your spring meeting we plan to review:

- Your Financial Foundations (cash reserve, cash flow, and debt)
- Investment Review
- Retirement Projection
- *Please email us with any additional agenda items you would like to discuss*

We are looking forward to seeing you soon!

Best,
<<Signature>>