

## Subject: Sample Post Meeting Email

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Good morning Mary,

Thank you again for the time you afforded Brian and I on Tuesday. We enjoyed our discussion on how to strategize the future and would love to talk further about your individual planning needs. As we discussed, a great start to understanding your future needs is to see where you are currently. This quick retirement analyzer might be helpful that initial discovery ([insert hyperlink for e-money lead generator](#)).

As you think about your future goals and objectives, our team would love to help you on your journey. I'll be in touch next week, but if you'd like to schedule a time now to see how we can help, please visit my calendar ([insert Calendly link](#)). As always, if any questions should arise at any time, please do not hesitate to let us know. We look forward to our conversation.

Have a great rest of your week!

**Kristen Hull**

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