

Subject: Sample Pre-Meeting Email

Good morning Mary!

Brian Duncan and I are excited to be at your office next Tuesday, February 14th starting at 9:30am to present a brief workshop on Financial and Retirement Ideas. Some of those focus points will include an update on the current markets, savings strategies, buckets for retirement, and tax strategies. While we'll meet as a group, we'd love to spend some time with you afterwards to answer any questions you may have. Of course, lunch will be provided!

If you're unable to meet that day, please let me know and I'm happy to schedule a zoom or phone meeting on a day convenient for you.

As always, if any questions should arise at any time both before or after our discussion, please do not hesitate to let us know at any time.

Have a great rest of your week!

Kristen Hull

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