



Hi {Firstname},

Thanks for joining us last week for the Taxes in Retirement workshop! I hope you found it a beneficial use of your time. There is a lot to go through, and they only give us an hour and a half, so I appreciate your attention and trying to follow along. I'm sure my voice gets annoying well before the 90 minutes is up!

I'm reaching out as I see you were one of the few people that didn't sign up for a follow-up strategy meeting that you are 100% entitled to.

That's totally OK, but I truly think that is where the most value is found for past attendees. We usually have about 70% of the group take us up on that offer, and it's immensely helpful, according to the feedback we receive. There truly is no obligation, no sales pitch, or anything like that. It's part of the class and what I agreed to do when they asked me to teach it.

Would you be open to a 15-30 minute chat (phone or in-person) and see if I can help apply these concepts to your personal situation?

It's OK to decline, not a problem at all, but I'd feel bad if I didn't at least offer. In fact there were attendees last week who so enjoyed the process and outcome that they already told me to use them as a reference for anyone who was on the fence. I'd be happy to put you in touch with their phone or email.

My personal goal is we find at least one overlooked financial or tax move that saves you enough money that you brag to your friends about it. Regardless you will leave with increased peace of mind.

Let me know your thoughts and if that might work for you. If so, email me back, and I'd be happy to make the calendars line up! If not, no problem at all.

You can also schedule a time on my calendar here:

[Click to Schedule](#)

Hopefully, we'll talk sometime soon. Have a great weekend!

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