



GETTING STARTED EMAIL TEMPLATE - FINANCIAL PLANNING NEXT STEP



Subject Line: Financial Planning Next Steps on behalf of <Advisor>

Hello **Client**,

I hope this finds you well. My name is [Team member], and I am a Financial Planner at TrailWise. I will be working closely with **Advisor** to develop your financial plan.

Below is the step-by-step guide to prepare for Phase One of your financial planning. Please feel free to reach out to me anytime during the process if you have any questions or concerns. I would be more than happy to assist you in any way possible.

Step 1: Set up your secure personal financial website - we refer to this website as '**The Lodge**'

- Please look for an email in your inbox with the subject line "Register for your Financial Website"
- Follow the instructions in that email to get set up

Step 2: Once The Lodge is set up – complete the following within your site:

- Navigate to the 'Vault' which contains the following 4 folders:
 - **Shared Documents:** contains the **Document Checklist** of the financial information we will need from you to complete our analysis. Please upload the documents to this folder for our review. **In addition, please upload the attached Client Profile to this folder – Remove the CP if we already have it.**
 - Disclosures/Agreements: our financial planning disclosures and our Form ADVs
 - Welcome to The Lodge: you can find helpful documents about the security and navigation of your financial website
 - Private Documents: you can use this folder to store personal documents that won't be shared with TrailWise

Securely Connect Accounts:

- From the dashboard, there is a section labeled 'Accounts' with an option to '+ Add Account'



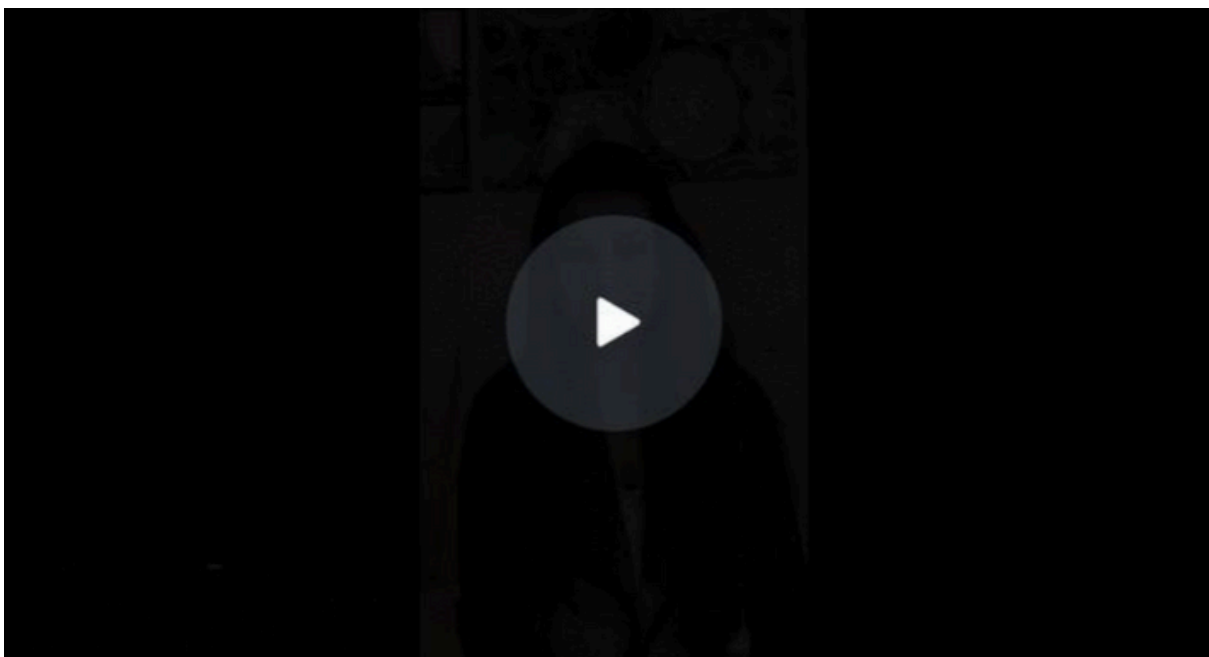
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- You can link the following accounts:
 - Bank accounts
 - Investment accounts
 - Debt (mortgage, credit cards, student loans, etc.)
 - And more

This is an important step to ensure we have updated information as we are creating and monitoring your plan

Here is a quick video walking you through your personal financial website: [Welcome to The Lodge - Watch Video](#)



Step 3: Complete the Goals Workbook

- The following link will take you to complete your [Find Your Path Workbook](#): [Add Link](#)
 - This is the goal envisioning document that allows you to dream a little and put your goals on “paper”
 - We will go through this workbook together during your next meeting



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Step 4: Schedule the 'Find Your Path' Meeting

- Once the above steps are complete, use this link to schedule the 'Find Your Path' meeting: [Add scheduling link](#)
- **If the client already has a meeting scheduled use this & remove first bullet point:** To ensure we have ample time to review your information and prepare for your meeting, we ask that you provide this information **by mm/dd (7 days before the meeting)**.
- **If a client hasn't scheduled the meeting use this:** Please keep in mind that once your meeting is scheduled, we ask that you provide the requested information at least **7 days prior**. This ensures we have enough time to thoroughly review your details and prepare for your meeting.

Step 5: Completing Payment

- **Please confirm payment frequency and payment method**
 - Total Annual Fee for the services of financial planning: [Add total fee](#)
 - Frequency options: Monthly, Quarterly, Annually
 - Payment Methods: ACH, Credit/Debit Card, Check made payable to TrailWise Financial Partners

After your Find Your Path Meeting, we will send the Financial Planning Agreement via DocuSign and the invoice to complete the payment via AdvicePay for ACH and Credit/Debit Card.

Looking forward to working with you!

Sincerely,