

ADVISOR NEXT STEPS EMAIL

TITLE: CandorPath Next Steps...

Hi Mark & Nancy,

It was such a pleasure meeting with you yesterday. Thank you again for the opportunity to walk alongside you on your financial journey. Our entire team is excited to get started and make this experience as smooth and meaningful as possible.

Rainah will be reaching out soon to help you get everything started, but in the meantime I recorded a quick video for you to watch at your convenience. Don't forget to bookmark www.candorpathclients.com as your resource hub with us!



Sincerely, John



John Kennedy, CFP®

CandorPath Financial

Partner & Senior Wealth Advisor

📞 407.502.7284

💬 407.904.8414

✉️ john@candorpath.com

📍 525 Sybelia Pkwy Suite 212
Maitland, FL 32751

