

## FIRST EMAIL: POST FINANCIAL LIFE MIND MAP

**TITLE:** Your Weekly Financial Progress Report!

Hey Mark and Nancy,

John shared that you all had a great meeting this week! I'm so happy to hear that.

As John mentioned during your time together, you can expect a brief weekly update from me as we begin working with you. There is quite a bit happening in the early days of our partnership, and our goal is to keep you informed and supported every step of the way. From setting up your MyPath dashboard to initiating account transfers, this email will serve as a helpful snapshot of where things stand and what is coming next.

You will hear from our team throughout the weeks as needed, but every Friday morning I will send a summary outlining the progress we've made and any outstanding items.

**Below is our first weekly recap. Please let me know if this reflects where things stand so far.**

- DocuSigns are in motion and will be sent to your inbox early next week. Once completed, we will open the following accounts and begin transfers: Nancy's Roth IRA, Mark's Traditional IRA, Mark's Roth IRA, and your joint investment account.
- After accounts are open, I will confirm transfer timing. This process usually takes just a few business days.
- Earlier this week, you received an email from Megan regarding next steps for your estate planning.
- Please link your mortgage in your MyPath Dashboard for accurate visibility. Here is a quick refresher link. I am happy to walk through it with you anytime.
- When convenient, please upload your latest company benefits for John to review before your next meeting.

P.S. I know John mentioned this already but please don't forget to save [www.candorpathclients.com](http://www.candorpathclients.com) to your favorites as a quick reference tool.

Sincerely,

Rainah Fitzgerald



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## SECOND EMAIL

**TITLE:** This Week on Your Financial Journey: Week 2 Update

Good morning and happy Friday!

We are officially wrapping up Week 2 of your Welcome Journey with us. A lot happens early on as we get everything aligned and organized, and we're thrilled with the progress so far. As always, my goal is to keep you informed, supported, and confident in each step we take together.

Here's a quick summary of where things stand heading into the weekend:

### What's Completed:

- DocuSign paperwork has been finalized.
- Your new accounts have been successfully opened.
- Transfers have been initiated for your accounts.

### CandorPath Next Steps:

- Transfers are in motion with an ETA of 5 to 7 business days. I will notify you once funded.
- Initial investment allocations and rebalancing will be finalized once transfers fully settle.

### Your Next Steps:

- Please upload your most recent company benefit details prior to our next meeting. This will help John review and make planning recommendations.
- If you haven't had a chance yet, please link the mortgage in your MyPath Dashboard for full financial visibility. I'm happy to assist if needed.
- Your meeting with the estate planning attorney is booked for October 30th at 10:00 am at our office. John will be there in this meeting with you as your financial advocate.

Thank you again for being so responsive and engaged. It makes this phase smooth and efficient...and we're excited to continue building momentum with you! As always, please don't hesitate to reach out if anything comes up or if you need help linking accounts or uploading documents.

Best,

Rainah Fitzgerald



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### THIRD EMAIL

**TITLE:** Week 3 Progress Report

Good morning, Mark and Nancy! Great progress this week, here is your weekly summary =)

#### What's Completed:

- Your accounts have been funded and this is now reflected in your MyPath client dashboard.
- Re-allocation of your 4 accounts has been completed.
- Initial tax review has been completed and ready to discuss with you.

#### CandorPath Next Steps:

- Re-allocation of your retirement accounts are underway in accordance with your plan.
- We are not selling or rebalancing assets in your joint account until we can have a thorough tax discussion with you.
- We will ensure your beneficiaries are updated based on the estate plan once those documents are finalized.

#### Your Next Steps:

- Company benefit details have been reviewed, as well as your tax projections for the year, and our team is ready to have a [quick meeting to review](#) and give recommendations before open enrollment ends!

Let me know if you have any questions!



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## FINAL EMAIL:

**Subject:** Final Weekly Update!

Hey Mark and Nancy,

I have some great news to share! Today is the final installment of your weekly updates from me 😊 You have successfully completed the “Welcome Journey” with us. As of this morning, all outstanding action items are wrapped up, and now is when the fun begins. John is ready to meet with you to plan and prioritize what’s next for the remainder of this year.

When you're ready, here is [John's Calendly link](#) to schedule your next planning session.

While these weekly updates are coming to an end, I would love to connect one more time either over coffee or a quick virtual chat for about 15 to 20 minutes. The goal is simply to hear more about your experience so far and learn what felt great and where we might enhance the process even more for future clients. Your candid feedback is incredibly valuable to us, and we want to continue refining the CandorPath experience to make it as thoughtful and seamless as possible.

Just reply back with a time that works well for you, and I'll get it scheduled. Thanks again for your trust and partnership...it has truly been a pleasure supporting you through these first steps. I'm excited for everything ahead!

Sincerely,

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## FOLLOW UP TEXT (SAME DAY):

Hi there! Rainah here from CandorPath. I just sent your final weekly update email 📧 When you have a moment, take a look. Also would love to grab coffee (or a quick virtual chat) soon to hear how your experience has been so far. Just reply with a time that works for you!