



Corona-Economy Confirmation Letter

Date

Mr. & Mrs. Client

Address

Dear Client,

This letter will serve as a confirmation of your complimentary call regarding the new Corona-Economy.

Date: **Thursday, Month/Day, 2020**

Time: **x:xx PM**

Phone: **(xxx)xxx-xxxx**

Below are some items we suggest you have on hand to ensure you get the most out of your scheduled call. We have also included a Confidential Financial Questionnaire for your own personal use. We suggest you take the time to fill it in to keep track of your investments.

ITEMS SUGGESTED TO HAVE ON HAND FOR YOUR SCHEDULED CALL:

2019 Tax Return

- Please have your latest tax return on hand for your scheduled call

Financial Statements

- Please have your recent statements on hand for your scheduled call
- This includes any 401(k), 403(b), IRAs, Pension Plans, Brokerage Accounts etc.


Confidential Financial Questionnaire

- This is for your own personal use to keep track of your investments
- **CLICK HERE** to fill out the CFQ

Please write down any questions you have, as we have found that if you take the time to write out your questions or concerns, they will not be forgotten! If you would like the advisor to review any of these statements prior to your call, feel free to contact us for instructions how to do so.

Please don't hesitate to call if you have any questions. Thank you for taking the time to talk with (**Advisors Name**), and we look forward to meeting with you in the near future.

Sincerely,



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