(Subject line) “Retirement” “Social Security” Consultation

Good afternoon CLIENT,

We wanted to send you a confirmation email regarding our scheduled appointment for DAY, DATE at TIME.

Our office address is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**4 Very Important forms we will need from you, to help us accurately plan for your retirement:**

1) Current 401K

2) Social Security Statement. (This can be printed off of SSA.gov)

3) Brokerage Accounts.

4) Any old forms of retirement plans, 401Ks, Stocks, Bonds, Life insurance policies, etc.…

Feel free to contact us at any time. If you need to reach \_\_\_\_\_\_ directly, you can contact him at \_\_\_\_\_\_\_\_\_\_\_\_\_

Please confirm that you have received this email and we look forward to seeing you soon!

Thank you and take care.