**Fact-Finding Confirmation Letter - Option 1**

**Client Onboarding STEP 7**

This resource is best used with clients who are not “A” level clients and have basic to moderate needs.

[Date]

[Name]

[Address]

[City, Province]  
[Postal Code]

Dear [Title Name],

I enjoyed meeting you the other day and I look forward to beginning the Financial Planning process with you.

I wish to confirm our next appointment:

Meeting with: [Financial Planner]

Date:

Time:

Address:

At this appointment, we will complete your Personal Financial Profile. This profile will summarize your current financial situation, and will allow us to decide which financial solutions will help you to achieve your goals. To ensure we proceed effectively, please bring the documents indicated on the following page.

If you have any questions or need to contact me prior to your appointment, I can be reached at [Your Contact Number].

I look forward to our next meeting.

Sincerely,

[Name]

[Title]

[Organization]

Enc.