# FIT Meeting Confirmation Email

**Client Onboarding STEP 4**

Use the following email template as a guide to assist you with confirming the FIT Meeting.

Create an **Outlook Template** to make step of the process consistent and efficient.

Dear [Prospective New Client],

I enjoyed speaking with you the other day and look forward to our upcoming appointment as follows:

Date:

Time:

Address:

As discussed, during this appointment we will have the chance to get to know more about each other.

I am going to share information with you about our approach to Insurance Solutions so you can determine if this is what you are looking for. In addition, we will be asking you to share information about your immediate and longer-term goals so we can determine if we can provide what you are looking for.

For your convenience, we have enclosed a map showing you where our office is located. Client parking is available at [describe the parking location].

If you have any questions, I can be reached at xxx-xxx-xxxx.

I look forward to meeting you.

Best Regards,

Advisor’s Name

Advisor’s Title