# Email #2b – Schedule Meeting to Review Options

**Client Onboarding STEP 8**

Use the following email template as a guide to assist you with following up after the Initial FIT where you have run the initial numbers and would like to set up a second meeting to carefully review and discuss their Insurance Options.

This email template is intended for **non-simple insurances cases**, where a more in-depth dialogue and discussion is required to ensure the client is suitably moving forward.

If you do not receive a response from the prospective client (by email or telephone) one week after sending this email, make a **follow up phone call**.

Copy and paste this script, modify it as appropriate and save it as an Outlook Template.

Hi [Prospective Insurance Client],

It was great having the opportunity to meet with you recently and learn more about your situation and needs as it relates to your family security.

I’ve had an opportunity to carefully review the various insurance solutions and options available to you, and I would like to find a time when we can discuss them.

When you have a moment, **please contact me** so we can set up a day and time that works for you.

I look forward to hearing from you soon and continuing to assist you with your insurance needs.

Your Standard Email Signature.