

Pre-Appointment Kit 1

Kit 1 - The Handwritten Card

This stunning greeting card is to be handwritten and attached to your Introduction Kit.

If applicable, add a personal note to the card about something from the initial conversation you had (i.e. FORM).

Dear [Prospective New Client],

I enjoyed talking with you on the phone. Enclosed is the Introduction Kit I promised.

I look forward to meeting you.

[Advisor's Signature]

