Prospect Follow Up Email Template

**Subject: The Importance of Planning for Retirement**

Dear [Prospect Name],

It was a pleasure meeting with you [when]. I look forward to the opportunity to work with you.

As you think over your decision about hiring a financial advisor, I want to emphasize the importance of not putting off your retirement planning too much longer. We find that people often delay retirement planning because there isn’t the same sense of perceived urgency as, say, doing your taxes. But every year that you put off planning for your retirement could potentially result in tens of thousands fewer dollars in retirement income each year, a delayed retirement age or, worse, running out of money in retirement years or decades before you planned.

When you become a client of [firm name], one of two things will happen:

1. We analyze your situation and determine you are on the right track. In this scenario, you can gain peace of mind knowing you are taking the right steps toward a successful retirement. Our role in this scenario is to continue providing guidance and offer course corrections when necessary to help ensure you stay on that path.
2. We identify where there is a gap between your retirement vision and your current financial situation. In this scenario, we develop strategies so you can make the changes now that can positively impact your retirement.

Whether you hire us or another financial advisor, I can’t emphasize strongly enough the importance of making retirement planning an immediate priority. We see too many people who come to us wait another year or two before they take the next step. The most common comment we hear from clients is that they wished they had hired us years earlier. While we hope you decide to become a client of [firm name], we are more interested that you are proactive in taking control of your retirement planning.

If you have any questions that have come up since our meeting, I’d be happy to schedule a follow-up call or meeting to discuss. I look forward to hearing from you soon.

Best regards,

[Your Name]