**Approved Strategy Session Email Reminder Template**

Hello <<ENTER STUDENT NAME>>,

Thank you so much for attending our <<ENTER COURSE NAME>> Workshop.

This is a reminder that we have you scheduled for a strategy session on <<ENTER DATE>> at <<ENTER TIME>> with <<COACH NAME HERE>>.

Our office is located at:          <<Enter Your Office Address Here>>

Your Strategy Session is intended as an extension of the class and an opportunity to get help on any financial questions you may have. The coach at his/her discretion, will offer Free Reports to aid in helping you with your questions. The scope of the Free Reports will dictate the information you should bring to your Strategy Session.

**Required Documents: Optional Documents:**

AFEA’s Monthly Budget Worksheet Most Recent Retirement Account Statements

- Pre & Post Retirement - 401k, IRA, Brokerage, CD’s, etc

Balance Statement of Total Financial Worth Any Insurance Policies

Recent Social Security Statements -Life, Health, Disability, etc

- Pension Info - Elected or not Paystubs – One full monthly cycle worth

Most recent Tax Return

If you have any questions, please let me know.

Thank you,

<<YOUR NAME HERE>>

<<YOUR CHAPTER NAME>>  
<<YOUR ADDRESS>>

<<YOUR PHONE NUMBER>>

<<YOUR FAX NUMBER>>  
[**http://www.myafea.org**](http://www.myafea.org/)