**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>>

This meeting with <<COACH NAME>> is for information gathering and understanding only. It is not a requirement to bring anything to this meeting. However, if you would like to make the meeting more productive you may bring any of the following items, if applicable:

* Any insurance policies (Life, health, disability)
* Most recent Brokerage statements
* 401k statement (If applicable)
* Monthly Budget
* Paystubs (3 weeks)
* Last two years tax returns

Your Strategy Session entitles you to a free Social Security Timing report.  This report will show you and your spouse (if applicable) the best ways to claim your Social Security benefits.  If you wish to take advantage of this free report, please bring your most recent Social Security statement(s).

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>>  
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