Email 1 - The day after last class

*Topic: Overwhelmed by getting organized? Start by getting your statements together*

**Headline:** Next Steps for your Retirement Planning Journey

[**name**],

Thank you again for attending [**course name**]! You’re probably wondering what comes next. I know that getting organized for retirement planning can feel overwhelming, and sometimes just getting organized can be the best first step.

That’s why I’m attaching a checklist to help you gather your financial statements. I hope you find it a useful tool you can use to compile your current financial situation to better prepare when planning your next steps for retirement!

[**download**]

And of course, I’m more than happy to have a 1:1 with you to discuss these next steps further!

[**calendar link**]