# Email #2a – Outline Insurance Options

**Client Onboarding STEP 8**

Use the following email template as a guide to assist you with following up after the Initial FIT where you have run the initial numbers and are sending them information about their Insurance Options.

This email template is intended for **simple insurance cases only**, where additional discussion is not required, and it does not involve a complicated decision-making process.

If they respond and want to proceed, send the Advisor Disclosure and have them sign and return it.

If you do not receive a response from the prospective client (by email or telephone) one week after sending this email, make a **follow up phone call**.

Copy and paste this script, modify it as appropriate and save it as an Outlook Template.

Hi [Prospective Insurance Client],

It was great having the opportunity to meet with you recently and learn more about your situation and needs as it relates to your family security.

I’ve had an opportunity to carefully review the insurance solutions and options available to you - I have provided an outline of these options with this email for your review and consideration.

Based on the options available, I recommend [indicate your preferred option based on client suitability] because I believe it is best aligned with your individual circumstances and family security needs.

* If you are in agreement with this recommendation, **please let me know** and I will move forward with our process and begin to outline the next steps to you.
* If you would like to discuss this further or have questions, **please feel free to contact me** so I can help you make the best decision.

I look forward to hearing from you soon and continuing to assist you with your insurance needs.

Your Standard Email Signature.