Elements®
Financial Planning System

Email Templates

Gathering Data for Elements Reports

Lt Liquid Term

Data Gathering & Verification

> Hi [*Client*],
>
> In preparation to review your liquidity and accurately calculate your Liquid Term (Lt) score, will you **please review the connected accounts and other assets on your client portal** and ensure the connections are live and values are up to date?
>
> This will help us assess if you're prepared for the unexpected and whether you have enough liquidity on hand to provide flexibility in each stage of your life.
>
> If you have any questions please let me know.

Sr Savings Rate

Data Gathering & Verification

> Hi [Client],
>
> In preparation to review your savings and accurately calculate your Savings Rate (Sr) score, will you **please respond with the following information for *[YEAR]***:
>
> 1. Savings into accounts for future real estate purchases and business acquisitions (if applicable).
> 2. Savings into retirement or other investment accounts.
>
> Providing this information will help us assess if you're on a good track to meet your future financial goals or if you need to make some adjustments.
>
> Please let me know if you have any questions.

Business Term

Data Gathering & Verification

Hi [*Client*],

In preparation to review your businesses and accurately calculate your Business Term (Bt) score, will you **please review your business assets on your client portal and ensure values are up to date**? If you've received an appraisal on any business within the last year, please let me know or update the value on the portal.

Updating this information will help us assess whether business decisions related to staff, marketing, and expansion are creating more wealth or just adding more expenses to your plate.

If you have any questions please let me know.

Equity Rate

Data Gathering & Verification

Hi [*Client*],

In preparation to review your investments and accurately measure your Equity Rate (Er) score, will you **please send copies of your most recent monthly/quarterly investment statements** for the following accounts?

- *[LIST OF ACCOUNTS]*

Updating this information will help us assess if you're experiencing too much or too little volatility in your investments based on your personal risk tolerance and life stage..

If you have any questions please let me know.

Qualified Term

Data Gathering & Verification

> Hi [*Client*],
>
> In preparation to review your retirement accounts and accurately measure your Qualified Term (Qt) score, will you **please review the connected accounts and other retirement assets on your client portal** and ensure the connections are live and values are up to date?
>
> This will help us assess if your qualified retirement investments are growing to match your retirement needs.
>
> If you have any questions please let me know.

Debt Rate

Data Gathering & Verification

> Hi [Client],
>
> In preparation to review your debt and accurately calculate your Debt Rate (Dr), will you please review the following items and complete **by [DATE]**?
>
> 1. Review the debts in your client portal and ensure **current balances** are accurate.
> 2. If you've made **extra payments** (above your minimum payment) on any debts, please let our team know how much.
> 3. If you've taken out **additional debt** or **refinanced** existing debt, please send a copy of the promissory note.
>
> This will help us assess if you are servicing too much or too little debt for your circumstances.
>
> Please let me know if you have any questions.

Rt Real Estate Term

Data Gathering & Verification

> Hi [*Client*],
>
> In preparation to review your real estate and accurately calculate your Real Estate Term (Rt) score, will you **please review your Real Estate values and debt on your client portal and ensure values are up to date**? If you've received an appraisal on any real estate within the last year, please let me know or update the value on the portal.
>
> Updating this information will help us assess how much of your wealth is concentrated in real estate and whether you should increase or decrease it to better meet your needs.
>
> If you have any questions please let me know.

Br Burn Rate

Data Gathering & Verification

> Hi [Client],
>
> In preparation to review your spending and accurately calculate your Burn Rate (Br), will you **please review your spending and determine how much you spend on average each month**? We currently have your monthly spending estimated as $[PREVIOUS SPENDING ESTIMATE]. Does this look accurate?
>
> This information will help assess the impact your personal spending has on many other areas of your financial health including how much money you'll need or the future and other future goals.
>
> Please let me know if you have any questions.

Tt Total Term

Data Gathering & Verification

> Hi [*Client*],
>
> In preparation to review your progress towards financial independence and accurately calculate your Total Term (Tt) score, will you **please review the connected accounts and other assets on your client portal** and ensure the connections are live and values are up to date?
>
> Updating this information will help us assess if you're on track to make work optional and prepared for other long-term goals.
>
> If you have any questions please let me know.

Ir Insurance Rate

Data Gathering & Verification

> Hi [Client],
>
> In preparation to review your insurances and accurately calculate your Insurance Rate (Ir) score, will you please review the following insurance policies to ensure accuracy? If you've added additional insurances, or coverage has changed, please notify our team and we'll adjust this in our internal system.
>
> *[LIST INSURANCE POLICIES HERE]*
>
> Updating this information will help us assess if you have the quantity and types of insurance you need to protect you and other important people in your life.
>
> If you have any questions please let me know.

Tr Tax Rate

Data Gathering & Verification

Hi [Client],

In preparation to review your taxes and accurately calculate your Tax Rate (Tr), will you **please gather and send tax returns for *[YEAR]***?

Sending this information will help us assess opportunities to capture tax savings and ensure you aren't paying too much in taxes for your income.

Please let me know if you have any questions.

In Income Rate

Data Gathering & Verification

Hi [Client],

In preparation to review your income and accurately calculate your Income Rate (In), will you **please gather and send your most recent pay stubs [or P&L, tax return, or estimates]**?

Sending this information will help us assess opportunities to make the most of your career, income and assets and ensure your wealth is moving in a positive direction.

Please let me know if you have any questions.

Estate Status

No template provided here - This element provides the opportunity for you to reach out to the client and have a proactive conversation about their estate plan. Review the summary and information needed and determine what items you may need to talk to your client about in your next meeting with them.