CLIENT RETENTION EMAIL TEMPLATE #1

Dear Client:

In our continuing efforts to prepare you for retirement and ultimately prepare a well- considered estate plan, we’ve been sharing a fascinating tool with our clients. It’s called the Willing Wisdom Index*™*.

Our firm’s goal is to ensure that all of our clients maintain a minimum Willing Wisdom Index™ of 75 or higher.

To get a better feel for this tool, you can take a look at this short 2-minute video: <https://youtu.be/1bxXVjJTOEg>

And here’s a sample Willing Wisdom Index™ Report to give you an even better feel for this impressive resource: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

To receive your own personal estate planning report, simply visit [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com), ignore the $199.00 and enter your **free access code\_\_\_\_\_\_\_\_\_\_\_\_\_.** Please note thataccess codes are time sensitive.

My Willing Wisdom Index™ is now 88. I say now, because after completing the questionnaire, I learned that I needed to do a little of my own work. It didn’t take a lot of effort, but it did have a significant positive impact on my family.

I know you’ll enjoy this entertaining and educational resource.

Talk soon,

Sincerely,

Your Trusted Family Advisor

My Willing Wisdom Index™ is 88

CLIENT RETENTION EMAIL TEMPLATE #2

Dear client:

Every once and a while something new in our industry has a profound impact on the way we help clients achieve their goals.

That new thing is called the Willing Wisdom Index™.

Here is a link to a short 2-minute video that will give you a glimpse of this fascinating tool: <https://youtu.be/1bxXVjJTOEg>

And here’s a sample Willing Wisdom Index™ Report to give you an even better feel for this impressive resource: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

I have to confess that my first Willing Wisdom Index™ was 58. But my custom report gave me a number of clear recommendations that quickly helped me raise my score to 88. More importantly, it brought my family together to think, talk and plan for the future.

Here is your **free access code** for you to receive your own Willing Wisdom Index™ result \_\_\_\_\_\_\_\_\_\_\_\_\_. Simply visit www.WillingWisdomIndex.com, ignore the $199.00 and enter your code. Please note that access codes are time sensitive.

I know you’ll enjoy this entertaining and educational resource. Don’t hesitate to call if you would like help implementing your recommendations.

Sincerely,

Your Trusted Advisor

My Willing Wisdom Index is 88

CLIENT RETENTION EMAIL TEMPLATE #3

Dear Client:

Not long ago, we shared a book with you called *Willing Wisdom: 7 Questions Successful Families Ask*. You might even have attended our event where we brought in the author, to share his message.

Well, I am pleased to share with you a new tool that helps implement many of the great ideas in that book – it’s called the Willing Wisdom Index™.

I recently received my Willing Wisdom Index™ report that measured how prepared my own family is to inherit. Let’s just say it was a real eye opener. I’m happy to say that my Willing Wisdom Index™ is now 82, but it started at 57.

We can all improve our estate plans. But my real message is that I’m here to help you.

Take 12 minutes to get your Willing Wisdom Index™. Here’s a short 2-minute video to give you a feel for this incredible tool: <https://youtu.be/1bxXVjJTOEg>

And here’s a sample Willing Wisdom Index™ Report to give you a better feel for how impressive this resource is: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

To receive your own Willing Wisdom Index™ report, simply visit: www.WillingWisdomIndex.com, ignore the $199.00 and enter your **free access code \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**. Please note that access codes are time sensitive.

I’m confident that you’re going to really enjoy this remarkable tool.

Sincerely,

Your Trusted Advisor

My Willing Wisdom Index is 82

CLIENT RETENTION EMAIL TEMPLATE #4

Dear Client:

It’s not often that I get excited about a new tool or resource that promises to help my clients achieve their goals.

I’m not going say much about this new resource other than, you have to try it.

Here’s a link to a short 2-minute video that will give you a feel for what I’m talking about <https://youtu.be/1bxXVjJTOEg>

And here is a sample Willing Wisdom Index™ Report: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

To receive your own Willing Wisdom Index™, visit [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com), ignore the $199.00 and simply enter your **free access code\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.** It’s our gift to you. Please note that access codes are time sensitive.

Immediately after completing the 12-minute questionnaire, you will receive an unbelievable report highlighting what you have done well, and where gaps in your estate plan remain.

Estate planning is so important (first name) which is why we are here to help you and your family.

Sincerely,

Your Trusted Advisor

My Willing Wisdom Index is now 83 it started at 56.

CLIENT FOLLOW-UP EMAIL #1

Dear Client:

A couple of days ago I sent you a **free access code** to receive your own custom estate-plan report.

The code I sent you will expire, so if you haven’t already done so, be sure to retrieve your personal estate plan report as soon as possible. Simply go to [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com) ignore the $199.00 and enter your free access code.

I can’t tell from my end if you’ve received your report because it is confidential. If you have received your Willing Wisdom Index™ Report, I’d love to know what you think and if I can help implement your recommendations?

If you haven’t received your report, I’ve attached a sample for you to see how impressive this resource is: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

This tool has helped so many of my clients build impressive estate plans. I hope we can do the same for you.

Sincerely,

John Smith, Trusted Advisor

My Willing Wisdom Index™ is 82, it was 38.