PROSPECT EMAIL TEMPLATE #1

Dear Prospective Client:

It was a pleasure meeting you at the Hospital Foundation gala – a fun evening for a worthwhile cause!

Reflecting on our conversation, I thought I would send you an invitation to a fascinating new resource that we’ve been sharing with our clients. It’s called *The Willing Wisdom Index*™ and it answers an important question: **How prepared is your family to inherit?**

Here’s a sample Willing Wisdom Index™ Report to give you a 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 simply enter your **free access Code\_\_\_\_\_\_\_\_\_\_\_\_\_\_**. Please note that access codes are time sensitive.

It only takes 12 minutes to receive your own 15-page personalized report that is 100% confidential -- **only you will see your report**.

It’s a great conversation starter for you and your family, and it will give you a better sense of how we approach our work from a multi-generational family perspective.

Here’s a link to a short 2-minute video that describes the *Willing Wisdom Index*™ in more detail:

<https://youtu.be/1bxXVjJTOEg>

I know you and your family will enjoy and benefit from this entertaining tool.

Kind Regards,

Trusted Family Advisor

My Willing Wisdom Index™ is 88

PROSPECT EMAIL TEMPLATE #2

Dear Prospect:

We’ve spoken in the past about some of the unique services we provide our high net worth clients to preserve family wealth.

I thought you might like to take a glimpse at a powerful new tool that we’ve been sharing with our clients that answers the question: **How prepared is your family to inherit?**

Here’s a sample Willing Wisdom Index™ Report to give you a 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.

It only takes 12 minutes to receive your own 15-page personalized report that is 100% confidential -- **only you will see your report**.

We work with all of our clients to maintain a minimum *Willing Wisdom Index*™ of 75. If you would like to raise your score and close some of the gaps in your estate plan, we would love to help.

Here’s a link to a short 2-minute video that describes the *Willing Wisdom Index*™ in more detail: <https://youtu.be/1bxXVjJTOEg>

Have fun and enjoy this fascinating tool that predicts how prepared your family is to inherit?

Kind Regards,

Trusted Family Advisor

My Willing Wisdom Index™ is 88

PROSPECT EMAIL TEMPLATE #3

Dear Prospects:

Not all advisors offer the same services. In fact, very few offer to help their clients build comprehensive estate plans.

To show you how different we are, I’d like to share a tool we use with our clients. It’s called the Willing Wisdom Index™ and it predicts you how prepared your family is to inherit.

Our experience tells us that real wealth has always been about family and family relationships. It’s why we approach everything from a different perspective.

Here’s a sample Willing Wisdom Index™ Report to give you a 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™, visit www.WillingWisdomIndex.com, ignore the $199.00 and simply enter your **free access code\_\_\_\_\_\_\_\_\_\_\_\_\_\_**. Please note that access codes are time sensitive

It only takes 12 minutes to receive your own 15-page personalized report that is 100% confidential -- **only you will see your score and report.**

We work with all of our clients to maintain a minimum *Willing Wisdom Index™* of 75. If your current advisor is ignoring estate planning, we would love the opportunity to help you close some of the gaps in your estate plan and raise your *Willing Wisdom Index*™.

Here’s a link to a short 2-minute video that describes this fascinating tool in more detail:

<https://youtu.be/1bxXVjJTOEg>

Have fun with this facinating estate planning resource!

Kind Regards,

Trusted Family Advisor

My Willing Wisdom Index™ is 88

PROSPECT EMAIL TEMPLATE #4

Dear Prospect:

It was a pleasure meeting you.

As I was reflecting on our conversation, it occurred to me that I should share a tool that we’ve been using with our long-term clients. It highlights our *family* approach to wealth management [insurance, tax planning, legal services].

Here is a link to a short video that describes the tool called the *Willing Wisdom Index*™ <https://youtu.be/1bxXVjJTOEg>

If you’re interested in receiving a free access code, just send me a quick email and we’ll send one to you right away. If you’d like an extra **free access code** for another family member, please don’t hesitate to let me know.

Once you receive **your free access code**, simply visit [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com). Ignore the $199.00 and enter your code. Your custom report will tell you how prepared your family is to inherit.

The *Willing Wisdom Index*™ is 100% confidential -- **only you will see your report (although our clients typically share their results so we can help implement their recommendations).**

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

I know you’ll find this tool both entertaining and educational – enjoy!

Sincerely,

Trusted Family Advisor

My Willing Wisdom Index™ is 88

PROSPECT EMAIL TEMPLATE #5

Dear Prospect:

It’s been a while since we last spoke.

I wanted to share with you a fascinating tool that we are using with our clients to help with their estate plans – it’s called the Willing Wisdom Index™.

Here is sample of what our clients receive after investing only 9-12 minutes: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

If you would like to receive your own custom *Willing Wisdom Index™* report, simply reply to this email and put “free access code” in the subject line.

When you receive your free access code, go to [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com) ignore the $199.00 and enter your code.

I look forward to serving you and your family and helping with your estate planning.

Sincerely,

Bill Smith, Trusted Advisor

My Willing Wisdom Index™ is 81, it was 44.

PROSPECT FOLLOW-UP EMAIL #1

Dear Prospect

A quick follow-up to inquire if you’ve had time to retrieve your Willing Wisdom Index™.

The free access 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 visit [www.WillingWisdomIndex.com](http://www.WillingWisdomIndex.com) ignore the $199.00 and enter your access code.

Do you have time this week to discuss your Willing Wisdom Index™ Report? A quick reminder that I won’t receive a copy of your report because it is confidential. It’s up to you to share it, or not. Either way, I’d be happy to help you implement your recommendations.

Here’s a sample of what you’ll receive when you invest 9-15 minutes completing the Willing Wisdom Index™ questionnaire: [SAMPLE REPORT](http://willingwisdom.com/wp-content/uploads/2017/05/samplereport.pdf)

Kind Regards,

Bill Smith, Trusted Advisor

My Willing Wisdom Index™ is 81, it was 44.