MICRO-EMAIL TEMPLATES

Use the templates below to send out your own micro-emails that revive prospects you may have lost touch with. All of the short templates are organized by topics relevant to financial advisers.

Instructions

- Pick a topic
- Copy and paste the micro email copy into an email
- Send to leads you haven't reached out to in 90 days or more.

WARNING: It's tempting, but don't include anything else other than the micro email copy and your sign-off. If you add more than necessary, the effectiveness of these emails will plummet!

Subject Lines.

- THE BEST SUBJECT LINE: [Lead's First Name]
- ALTERNATE SUBJECT LINES: [Topic Category]

EXAMPLES

- Retirement questions
- College planning

- Financial planning
- 401k rollover

Check out these examples below.

"Retirement" as the subject line along with body text copied from one of the choices provided in this guide.



Lead's first name as the subject line along with body text copied from one of the choices provided in this guide.



Retirement

Do you still have questions about your retirement?
Are you still looking for retirement advice?
Are you still considering retirement next year?
Are you still planning to retire next year?
Are you still interested in retiring?
Are you still looking for help with retirement?

Investments

Are you still considering a 401k rollover?

Are you still looking for help with your 401k rollover?

Do you still have questions about your investments?

Are you still looking for help with your investments?

Are you still interested in getting help with your investments?

Are you still looking for investment advice?

Do you still have questions about your investments?

College Planning

Are you still looking for help with college planning? Are you still looking for college planning help? Do you still have questions about college planning?

Financial Advice

Are you still looking for an adviser?
Are you still looking for a financial adviser?
Are you still looking for financial planning?
Are you still looking for financial advice?

Taxes

Are you still looking for help with your taxes? Are you still interested in getting tax help? Are you still looking for tax advice? Do you still have questions about your taxes?

Want to create your own? Try these formulas:

- Are you still looking for help with...
- Are you still interested in...
- Are you still looking for...
- Do you still have questions about...



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