



IRA Confirmation Letter - Workshop

April 29, 2022

(Prospect Name)

(Address)

(City, State ZIP)

Dear (Name),

This letter will serve as a confirmation of your appointment regarding our recent IRA Workshop.

Date: (Day of Week, Month/Day, 2020)

Time: (XX:XX PM)

Location: (Address)

Phone: (xxx)xxx-xxxx

We have included a confidential information questionnaire for your perusal. We'd like you to answer only those questions that you feel comfortable disclosing. **Please do the best you can, but don't stress over it.** Below are some items we suggest you bring that will help ensure you get the most out of your free hour with (Advisor).

ITEMS TO BRING FOR YOUR IRA APPOINTMENT

- IRA year-end statements
- Summary of your investments
- Your most recent tax return
- Written out questions (we have found that if you take the time to write out your questions or concerns they will not be forgotten)

Please don't hesitate to call our team if you have any additional questions. We sincerely thank you for taking the time to come to our office, and we look forward to meeting you.

Sincerely,