

Sample Pre-Appointment Confirmation Letter

Direct Mail Piece for KSI Representative:

Should be used on approved letterhead only.

Approval: Submit this piece on the letterhead on which it will be sent.

(insert date)

(insert client's name and address)

Dear (insert Client's First Name):

I am looking forward to meeting with you on (insert date) at (insert time).

In order to make the best use of our time together I ask that you gather together a few items and bring them with you to the appointment.

To help get you organized, I have included a comprehensive fact finding questionnaire that will serve as a guide during our meeting. Please do not be concerned about completing it. It is simply a tool to help begin our discussion. I ask only that you bring with you the basic information to get started.

Finally, I have enclosed some information about my firm and the services we provide —as well as a map to the office.

Please don't hesitate to call if you have any questions.

Sincerely,

(insert your name)