

## (15A) Next Steps Letter

Dear **(Name)**:

Welcome to the next step on your way to meeting your financial goals! From our conversation on **(date)**, it sounds like you are already doing a great job **(positive statement from intake)**.

This next step is going to require some time and effort on your part. Most of the people we have worked with report that the exercises have been worth the effort. I ask that you complete three forms:

1. The first form to take a look at is the **Quick Review**. This exercise will help you prioritize the financial goals you identified during our conversation, and add any you may have forgotten.
2. The next form is the **Quick Quiz**, which is a series of questions about some financial topics. If you are like most people, your reaction to taking any quiz will be YUCK!!! But identifying what we know about money subjects is tricky - a lot of the terms and concepts may be familiar, but most of us never learned about these subjects in school, so we may not know as much as we think we know. And why is that important? Well, knowledge is power. The more you know about money and other financial topics, the more control you will have over your financial future. That is a good thing.
3. And finally the **Quick Questionnaire** gives us some information about things in your life that can affect your ability to meet your financial goals.

Once you have completed the forms, send them back to me in the envelope provided. I will review them and gather the materials for the next step, which will be the MAP (My Action Plan) meeting. The MAP meeting will take 2 hours depending on what we need to accomplish. You will leave the MAP meeting with the start to a step-by-step plan for meeting your goals. We will also decide how much follow-up support you think you will need as you work on your action plan.

So here is a summary of the next steps:

- You complete the Quick Review, Quick Quiz and Quick Questionnaire and use the enclosed envelope to mail them back to me.
- I will use those forms to pull together some materials, and then I will call you to schedule our MAP meeting.
- Together we will create an individualized plan that meets your specific needs.

I look forward to meeting with you. Please feel free to give me a call if you have any questions.

Sincerely,

**Financial Mentor's Name**

**Financial Mentor's Phone Number**