

MyRepChat - Sample Templates

First Text

Hi \${contact.firstname}. This is (Advisor Name) and this is my business texting number. Please save this number in your phone as my business contact information so that I can send appointment reminders and other messages.

Meeting Reminder

Hello \${contact.firstname} just a quick reminder of our meeting set for tomorrow at (Time). To confirm, reply with “Confirm”. To decline, reply with “Reschedule”.

Confirm (can be used with Auto Responses)

Great, I look forward to speaking with you soon!

Reschedule (can be used with Auto Responses)

I will contact you to reschedule our meeting.

Annual Review

Hi, \${contact.firstname}, it is time for your annual financial review. Please contact me at [insert phone number/email] to schedule this important meeting.

Check Email

Hi \${contact.firstname} please check your email for the paperwork we sent you.

First Meeting

\${contact.firstname}, great meeting you today!

Happy Birthday

Happy Birthday \${contact.firstname}! I hope you have a terrific day!

Funds Transferred

Hi \${contact.firstname} your funds have been transferred to your account of record.

Meeting Follow-Up

Hi, \${contact.firstname} thanks for a great meeting today. I look forward to connecting again soon to follow up on our discussion today.

Form CRS (Customer Relationship Summary) Link

Please review the LPL Customer Relationship Summary with this link:
<https://www.lpl.com/content/dam/lpl-www/documents/disclosures/lpl-financial-relationship-summary.pdf>

Funds Invested

Hi, \${contact.firstname} your funds have been invested per our discussion.

Paperwork in Mail

Hi, \${contact.firstname} your paperwork is in the mail. Please sign and return.

Texting Available

Hi \${contact.firstname}, this is Financial Advisor with 123 Financial. This number is now able to accept texts, so please feel free to communicate with me via text here moving forward.

Tax Returns

Hi \${contact.firstname}, please bring a copy of your tax return to your review so we can review it for you.

RMD Processed

Hi \${contact.firstname} – This is ABC Wealth Management. We wanted to let you know that your RMD has been processed per your instructions. Please verify that you see the funds in your account. If you have questions, please contact our office.

Seminar Reminder

Hello \${contact.firstname} - I look forward to seeing you at the seminar next Tuesday. It starts at <time> at the office. See you there!