

**VIRTUAL ADVISOR KIT:**

SOCIAL MEDIA & EMAIL CONTENT

**ADVISOR INSTRUCTIONS: FOLLOW THESE RULES**

For each of the social posts and the email, there is some tailoring that will need to happen to best fit your practice. Please follow the steps below:

* If you do not hold a 65 license, please change the term “advisor” to “financial professional.”
* Please delete or change the offerings based on what your current office can provide. If you do not have a secure document upload area, please delete. If you do not have a Calendly or scheduling software set up, feel free to just include your telephone. Only list what services you are currently offering (i.e. virtual appointments, phone appointments, etc.).
* Please include your disclosure at the bottom of the email.

SOCIAL POSTS

We’re going virtual! Because of the current situation and to keep with social distancing recommendations, we’re offering complimentary one-on-one virtual meetings. Click the link below to schedule a time to talk or give us a call at [advisor number]. Now is a crucial time to talk about your retirement! [Calendly link]

**Now is a crucial time to talk to an advisor about your retirement.** To protect our clients and friends, we’re offering phone appointments and virtual meetings for those who would rather not come into the office. To schedule your one-on-one appointment, call us at [number] or click on the link below to schedule your appointment. [scheduling link]

EMAIL

**Subj:** COVID-19 – Our Response and Meeting Procedures (We’re going virtual!)

To our valued clients and friends,

We have been closely monitoring the COVID-19 situation and want to share the efforts we’re taking for the safety of our [company name] family. As many schools and public gathering facilities are closing to contain the spread of the virus, our response cannot be to continue as usual.

**More than ever before, now is the time to understand what your current retirement strategy is and schedule an appointment to talk about your future.** The markets are unpredictable and will fluctuate vastly as this situation unfolds over the next few months. We want to help you mitigate your risk.

Because many of our clients and friends are in the highest-risk age group for both this illness and market volatility, we are offering several different routes for you to meet with us:

* Phone call appointments. We can discuss your information over the phone and use the secure document uploader to protect your financial information.
* Secure document upload. This is an online site that ensures your private financial documents are provided to our team in a secure fashion.
* One-on-one appointment. We’re choosing to keep our office open for one-on-one appointments only. We thoroughly disinfect between each of our appointments, especially high-touch areas like chairs, door handles, and other common areas.
* Virtual appointment. Using a secure online meeting room, we can meet “face-to-face” using your phone, laptop, or tablet!

Our customer service hasn’t changed. We’re here to help you prepare for retirement, no matter what the current environment looks like. **Schedule a meeting with us by clicking on the link below or by calling our office at [number].**

**Schedule a Meeting** (button w/Calendly link)

Sincerely,

Advisor Name

Advisor Practice

ADVISOR DISCLOSURE

1124661-0321