

Weekly Email Update Template

Weekly Referral Update

To: ABC Accountants
From: XYZ Financial Services
Email: accountants@email.co.uk

<i>Client Name</i>	<i>Referred By</i>	<i>Latest Action</i>	<i>XYZ Adviser</i>	<i>Action Required</i>
Mr&Mrs Smith	John Partner	Met with clients on Tuesday 3rd	Mike Andrews	XYZ to follow up with client next week to see if they will proceed to planning stage
Mr Jackson	Mary Manager	Presented advice to client on Thursday 5th	John Elliot	Client has agreed to implement plan as presented. Paperwork being prepared by XYZ
Mrs McGregor	Bill Baxter	Advice has been prepared and meeting is booked with client on Monday	Mike Andrews	Bill to read draft plan and executive summary and provide any feedback to Mike by 11th

Advise Better
Live Better