



To Names(s) _____

APPOINTMENT REMINDER

Our appointment is scheduled for: Our Office ___ Your Office ___ Your Home ___ Other ___

Our Fax/email Directions Included ___ Please fax/email your directions & a map if available ___

MONTH	DATE	DAY	TIME
			PM AM

As a reminder, please:

PLEASE Read the information package cover to cover.

- A. Prepare any questions you may have in advance.
- B. Recognize in order to qualify, basic financial information may be required and better defines your corporate and personal requirements.
- C. ***Complete the enclosed "Client Profile/Resume Survey – Total Needs Analysis" and FAX or EMAIL this to me BEFORE for our appointment.** This information helps define a current financial profile, which most businesses and families need to update. You will be amazed how many appreciate this one service we provide. (In over 30 years of professional experience as a Financial Planner, Investment Advisor, Marketing and Publisher, this single form has had profound positive results for my clients!).
- D. **All Client / Corporate decision-makers must be present**
- E. If married and make your financial decisions together, both parties need to be available for our appointment. Please keep your appointment(s). We have scheduled this time for you to answer your questions and provide a simple, comprehensive review of the benefits this opportunity can provide you, your family, and your business.
- F. If we define a plan and provide solutions to your corporate, marketing, promotional, advertising, financial, and investment needs....to increase your personal or business income, sales and market share, with out implementation....It's just another opportunity LOST FOREVER!

THANK YOU

I am personally looking forward to speaking together at our next appointment. In the event you are **UNABLE** to keep our appointment, please call 24 hours in advance to reschedule the next earliest time and date in order that we can fulfill other client's requirements

To Our Mutual Success,
James S. Davis, Jr.
 President/CEO/Founder