



## Welcome & Value Introduction Email

Subject : Kevin, let's map your future

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Hi Kevin,

Glad to have you with us.

You want to grow your money, plan ahead, and stay in control.

We're here to help you do that.

Here's what we do:

- **Wealth Management.** We build smart plans to grow your money and guard it from risk.
- **Investment Advice.** We help you make your money work harder.
- **Financial Planning.** We map out your future so you can move with purpose.

We give you the tools and know-how to take charge.

What's next?

Watch your inbox. We'll send you tips to help you start strong.

Want to see what we offer? [\[Explore Services\]](#)

Glad you're here.

– Team Astute



## Establish Trust with Educational Value

Subject Line: Michael, planning beats guessing...

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Hi Michael,

You don't need a fortune to get started. You need a plan that works.

Here are **three steps** you can take right now:

- **Set a goal.** Know what you want. A home. Early retirement. College funds. The “why” matters.
- **Start small, stay steady.** Even a little money, invested often, can grow big with time.
- **Lean on experts.** You don't have to guess. We help you make smart moves from the start.

The best time to start was yesterday. The next best time is now.

Want a plan that fits you? [Book a Free Consultation]

Talk soon,

Team Astute



## Nudge Toward Action

**Subject Line: custom plans, real results**

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Hi Michael,

You have goals. We help you reach them.

At Astute, we don't hand you a cookie-cutter plan.

We build one for you based on where you are and where you want to go.

Here's what we offer:

- Smart plans built around your life
- A range of investment options
- Ongoing support from real people
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If you're ready to put your money to work, let's go.

[Schedule your free consultation.] Let's build something solid.

Team Astute