Dear **Client Name**,

I want to make our meeting as seamless and easy as possible, so I have attached a checklist of necessary items. Please come prepared with the requested information.

The three major topics that we’ll go over together are:

1. Income
2. Occupation
3. Medical history

It’s important to disclose all details. Any undisclosed information could cause your application to be rejected.

All of this may seem overwhelming, but I want to make the best use of your time and get the best possible plan for you the first time around.

I’m here to help you, so please don’t hesitate to contact me.

Thank you for your time.

**Agent Name**