UNC OVE R



*Weekly Email Update Template*



*Advise Better*

*Live Better*

*Weekly Email Update Template*

Weekly Referral Update

***To:*** ABC Accountants

***From:*** XYZ Financial Services

***Email:*** [accountants@email.co.uk](mailto:accountants@email.co.uk)

Client Name Referred By Latest Action XYZ Adviser Action Required

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Mr & Mrs Smith | John Partner | Met with clients on Tuesday 3rd | Mike Andrews | Met with clients on Tuesday 3rd |
| Mr Jackson | Mary Manager | Presented advice to client on Thursday 5th | John Elliot | Presented advice to client on Thursday 5th |
| Mrs McGregor | Bill Baxter | Advice has been prepared and meeting is booked with client on Monday 16th | Mike Andrews | Advice has been prepared and meeting is booked with client on Monday 16th |