10 Year Past Client Plan Contact #3

Closing Documents

Hi (FIRSTNAME)

I was just moving your file the other day to my closed files and wanted to touch base with you. Do you have everything you need for your records? If not please let me know and I can send them out to you.

I also wanted to check in with you and wanted to see if you know of any co-workers, friends or family members that are thinking about making a move. If anyone comes to mind, please let me know as I would be more than happy to help.

Have a great day!

(AGENT SIGNATURE)