

# TAYLOR SCHULTE

CFP®

## Online Review Request Email Template (Client)

Dear Client,

This is your friendly reminder to log into your [Client Portal](#). Your Client Portal is where you can view your accounts, pending financial planning tasks, and your recent quarterly report.

Lastly, one of our founding principles at Define Financial is to lead with transparency. In the spirit of transparency, **we are asking if you would please post an honest review of your experience with our firm.**

We would be honored if you did. And the countless retirement savers searching the web for qualified financial advice would similarly appreciate your contribution.

**Leaving a review is really easy and takes less than 30 seconds:**

[Click Here to Leave a Google Review](#)

[Click Here to Leave a Yelp Review](#)

As always, if you have any questions or concerns, please reply to this email or contact our office at (858) 345-1197.

Sincerely,

### **The Team at Define Financial**

Define Financial

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