**Titre: Summary of our meeting**

Hello Mr./Mrs./Ms. x,

I greatly appreciate the time you have taken to meet with me.

Below is a summary of all the measures you showed interest in while using the COVID-19 analysis tool:

\*\*\*Select based on needs\*\*\*

* Canada emergency response benefit ([Click here](https://www.canada.ca/en/services/benefits/ei/cerb-application.html))
* Incentive program to retain essential workers ([Click here](https://www.revenuquebec.ca/en/press-room/news/details/167331/2020-04-03/))
* Extra time to file income tax returns ([Click here](https://www.canada.ca/en/revenue-agency/campaigns/covid-19-update/covid-19-filing-payment-dates.html))
* Support for seniors ([Click here](https://www.canada.ca/en/department-finance/economic-response-plan.html/#eased_rules_registered_retirement_income_funds))
* Increased canada child benefit ([Click here](https://www.canada.ca/en/department-finance/economic-response-plan.html/))
* Student loans ([Click here](https://www.quebec.ca/en/education/student-financial-assistance/repayment/))
* Mortgage support ([Click here](https://www.cmhc-schl.gc.ca/en/media-newsroom/coronavirus-update))
* Increased GST credit ([Click here](https://www.canada.ca/en/revenue-agency/services/child-family-benefits/covid-19-gsthstc-increase.html))
* Extra time to pay taxes ([Click here](https://www.cfib-fcei.ca/en/advocacy/employment-and-labour/quebec-municipalities-during-covid-19-what-are-they-doing-support))

My role is to get to know you, advise you and support you!

Together, we will build a simple and efficient plan:

1. Determine your goals and interests based on your needs and those of your family
2. Determine your priorities
3. Build a solution adapted to your needs, based on your profile
4. Meet with you periodically and be present to support you throughout the different stages of your life

\*\*\*Adjust based on situation\*\*\*

No second meeting required

A well-established strategy and sound advice will allow you to get the odds on your side. Now, what's the plan? I am offering you a virtual meeting on (date) and it will be my pleasure to help you optimize your financial plan.

OR

Second meeting required

Now, what’s the plan?
As agreed, we will optimize your financial plan during our virtual meeting scheduled on (date).

Thank you and have a good day.

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| Did you know that since the beginning of the crisis, **our clients have saved an average of $347 per year** on their home and auto insurance?Dedicated telephone service: 418-650-4641Promotional code to use when submitting an application: \_\_\_\_\_\_\_ |

Signature