



## Home Page Sales Funnel eBook Emails

### AUTOMATED SALES EMAIL SERIES

#### EMAIL #1: Download the eBook

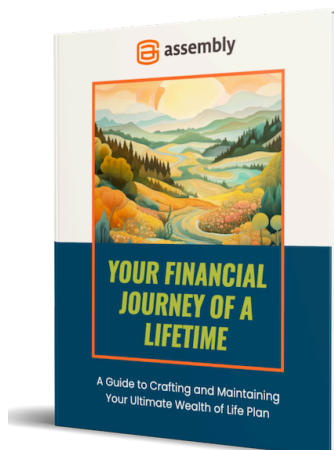
**From Name:** Valerie DeVol

**From Email:** vdevol@letsassemble.com

**Subject Line:** Your ebook is here!

**Preview Text:** Thank you for downloading our guide to crafting and maintaining your ultimate wealth of life plan.

**Campaign:** AW Financial Journey



Dear {personalization: First Name/Friend},

Thank you for downloading ***Financial Journey of a Lifetime: A Guide to Crafting and Maintaining Your Ultimate Wealth of Life Plan.***

You can re-download your free eBook anytime by [clicking here](#).

Our mission is to assist you in pursuing the life you envision—a life where you are well-prepared for retirement, shielded from unnecessary financial risks, and capable of leaving a meaningful legacy.

If you have any questions, please don't hesitate to contact me via email at [val@assemblywealth.com](mailto:val@assemblywealth.com) or give me a call at [415-541-7774](tel:415-541-7774).

Sincerely,  
Val



Valerie DeVol  
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## EMAIL #2: Problem + Solution

**From Name:** Valerie DeVol

**From Email:** vdevol@letsassemble.com

**Subject Line:** Struggling to find financial confidence?

**Preview Text:** Let us empower you to navigate your financial journey confidently with a personalized wealth of life plan.

**Campaign:** AW Financial Journey

Dear {Personalization: First Name/Friend},

Whether you're focused on building or preserving wealth, we understand the unique challenges you might be facing:

1. **Financial Uncertainty:** Market fluctuations, economic changes, and unexpected life events can leave you feeling uncertain about your financial future.
2. **Complex Financial Decisions:** Managing investments, planning for retirement, and navigating taxes can be overwhelming without the right guidance.
3. **Balancing Your Dreams:** You want to enjoy life now while ensuring a secure future, but finding that balance can be daunting.
4. **Lack of Clear Strategy:** Without a clear financial strategy, it's easy to feel adrift, unsure if you're making the right decisions.

The good news is that you don't have to navigate your financial journey alone.

At [Assembly Wealth](#), we believe in empowering you with the knowledge and strategies needed to conquer financial challenges and achieve your dreams.

A well-crafted financial plan, tailored to your unique circumstances, is the solution to these challenges. It provides you with a roadmap to navigate the complexities, make informed decisions, and build a more secure financial future.

I'm here with my team of experts, ready to discuss how a personalized financial strategy can bring clarity and confidence to your financial life. Let's start with a confidential conversation to figure out what's important to you.

There's no obligation, just an opportunity to explore how Assembly Wealth can make a positive impact on your financial journey. Feel free to reply to this email, and we'll be happy to assist.



Best Regards,  
Val



Valerie DeVol  
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P.S. Your financial well-being is our priority. If you have any questions or simply want to chat about your financial goals or concerns, don't hesitate to reach out. You can simply reply to this email or [call us](#) anytime. We're here to help you achieve financial peace of mind!

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## EMAIL #3: Overcome an Objection

**From Name:** Valerie DeVol

**From Email:** [vdevol@letsassemble.com](mailto:vdevol@letsassemble.com)

**Subject Line:** Addressing your financial questions, {Personalization: First Name/Friend}

**Preview Text:** We're here to help address concerns you may have about your financial future.

**Campaign:** AW Financial Journey

Dear {personalization: First Name/Friend},

We hope you've had a chance to dive into the [eBook](#) you downloaded about exploring the power of financial strategy. It's not uncommon for this subject to raise questions or uncertainties, and we're here to provide clarity and support every step of the way.

Is there something specific from the eBook that sparked curiosity or left you wondering? Please don't hesitate to share your questions with us. You can simply reply to this email, and I'll be happy to provide insights and answers.

If you have a partner or family member who is also exploring financial planning, feel free to forward this email to them. We're more than happy to assist with any inquiries they might have as well.

Perhaps you're already on a financial journey, but you're seeking guidance on specific aspects or need assistance with investment management. We're here to help with that too. Just let us know your needs, and we'll work together to find the right solutions.



Remember, achieving financial peace of mind often starts with a simple conversation. Don't hesitate to reply to this email, even if it's just to explore possibilities. We're here to support you in your financial journey.

Looking forward to connecting with you,  
Val



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P.S. If you'd like to delve deeper into your financial strategy, let's set up a time for a confidential chat. Call us at [415-541-7774](tel:415-541-7774) or reply to this email. Together, we can map out a path to your financial goals.

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## EMAIL #4: Testimonial

**From Name:** Valerie DeVol

**From Email:** vdevol@letsassemble.com

**Subject Line:** A Real-Life Financial Success Story

**Preview Text:** Discover how we helped a client turn financial challenges into opportunities.

**Campaign:** AW Financial Journey

Hello {personalization: First Name/Friend},

I'm excited to share an inspiring **success story**.

One of our valued clients had been holding onto two life insurance policies that no longer served a purpose. Surrendering these policies would have meant facing a hefty \$50,000 in taxable income.

However, our client had a vision that went beyond their own financial well-being. They wanted to give back to their community, leaving behind a legacy that would be cherished for generations.

This is where we stepped in.



We worked closely with our client to establish a donor-advised fund, a strategic financial tool for charitable giving. Our client was able to generously donate the two life insurance policies to this fund, which resulted in an immediate sizable income tax deduction.

The impact was twofold: not only did this contribution reduce the client's tax burden, but it also paved the way for tax-free growth within the fund, allowing for future charitable contributions. \*

This inspiring story reminds us that financial planning isn't just about numbers; it's about creating meaningful impacts, both for ourselves and for the communities we care about.

While every financial journey is unique, the power of smart financial planning lies in its ability to transform challenges into opportunities.

If you'd like to explore how we can help you navigate your own financial concerns and create a brighter future, don't hesitate to reach out. We're here to support you!

To your financial peace of mind,  
Val



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P.S. If you're curious about the possibilities, feel free to call us at [415-541-7774](tel:415-541-7774) or simply reply to this email. Together, we can create your own success story.

*\*Assembly is neither an attorney nor an accountant; no portion of this content should be interpreted as legal, accounting, or tax advice. Individuals should consult with an investment professional, attorney, or tax professional regarding their specific investment, legal, or tax situation.*

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## EMAIL #5: Sales Letter

**From Name:** Valerie DeVol

**From Email:** [vdevol@letsassemble.com](mailto:vdevol@letsassemble.com)

**Subject Line:** Are money decisions stressing you out?

**Preview Text:** We're here to offer confidential wealth management guidance towards financial well-being, confidence, and wealth of life.

**Campaign:** AW Financial Journey



Dear {Personalization: First Name/Friend},

Navigating the world of financial planning can be a daunting task, and I understand that you may have reservations about making significant changes to your financial strategy.

However, it's essential to consider the potential impact of a suboptimal financial plan:

- Missed opportunities for growth and wealth accumulation.
- Inefficient use of resources, leading to financial clutter.
- Inadequate risk management and financial security.
- Limited visibility into your financial future.
- A sense of unfulfilled financial potential.

The truth is, a well-crafted financial strategy can significantly enhance your financial well-being. It can help you achieve your financial goals, whether that's early retirement, funding your child's education, or leaving a lasting legacy for your family.

At [Assembly Wealth](#), we specialize in creating personalized financial strategies that align with your unique financial goals, risk tolerance, and aspirations. We believe in maximizing your financial potential while ensuring your financial security and peace of mind.

Our goal is to make it easy. Here's how we'll help you transform the financial planning process into a personalized roadmap to a more fulfilling and meaningful life:

### **Step 1: Let's Have a Confidential Conversation**

Before any financial planning begins, let's figure out what's important to you. We want to get to know you.

### **Step 2: Guidance Towards Your Goals**

Let's create a financial roadmap that's as unique as you are. It's not just about numbers; it's about making your money align with your goals, passions, and dreams.

### **Step 3: Financial Clarity & Peace of Mind**

We'll walk hand-in-hand towards peace of mind. We'll celebrate your successes and support you through life's challenges. Your financial plan will stay up-to-date, adjusting to changing needs and goals. We believe you deserve a future where wealth and personal fulfillment coexist, guided by our dedicated partnership.

So, why not take the first step towards aligning your financial life with what truly matters to you? Simply reply to this email to discover the possibilities that await you.



I'm excited about the opportunity to help you achieve your financial goals. If you have any questions or want to get started, feel free to reply to this email or call us at [415-541-7774](tel:415-541-7774).

Most sincerely,  
Val



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P.S. Ready to enhance your financial future? If you'd like to talk, call me at [415-541-7774](tel:415-541-7774) or reply to this email. It's time to take control of your financial future and achieve the goals you deserve.

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