

## Template Name: Next steps for new clients

### Content:

**Your proposal was successfully accepted!** 🎉

A confirmation email has been sent to {{ client.email }}.

Thank you for choosing {{ practice.name }}. We're excited to get started!

Please follow these next steps:

1. Click here to book your introductory kick-off call.
2. Fill out this onboarding form.
3. Send any requested forms to {{ proposal.sender\_email }}.

***{{ comment }} Link your calendar booking link and any questionnaires or forms in the steps above. {{ endcomment }}***

Regards,

{{ proposal.sender\_name | default:practice.admin }}  
{{ practice.name }}

## Template Name: Next steps for existing clients

### Content:

**Your proposal was successfully accepted!** 🎉

A confirmation email has been sent to {{ client.email }}.

Thank you for choosing {{ practice.name }} again. We look forward to your continued success!

Please follow these next steps:

1. Please click here to book your planning call.
2. Send any requested forms to {{ proposal.sender\_email }}.

***{% comment %} Link your calendar booking link and any questionnaires or forms in the steps above. {% endcomment %}***

Regards,

{{ proposal.sender\_name | default:practice.admin }}  
{{ practice.name }}

## **Template Name:** Next steps for individual tax return clients

### **Content:**

**Your Individual Tax Return proposal was successfully accepted! 🎉**

Please click the link below to complete the client in-take form, this information is important and is required for us to lodge your return.

Fill out the intake form here.

***{% comment %} Link your client intake form in the sentence above. {% endcomment %}***

Regards,

{{ proposal.sender\_name | default:practice.admin }}  
{{ practice.name }}