Dear XXXXXX,

I am so glad you enjoyed my recent presentation and I hope I gave you some good nuggets to be able to take back to your law firm and implement to become more profitable. Attached is the first of the three things you requested I send you, the Credit Card Authorization form. Remember, you will have to make the changes that are appropriate for your firm. Are you comfortable charging their credit card the day you issue an invoice or would you like to give them 3, 5 or 10 days to dispute the bill? Things you need to change are highlighted to make sure you don’t forget to change something.

To get the language for your fee agreement, click on this link LINK GOES HERE and it will take you to our website where you can download it.

Again, it was great to meet you and if you have any questions or would like to book time with me, simply [click here](https://www.timetrade.com/book/H8DNR%2B) and schedule a free initial consultation.

Thank you,

Brooke Lively

Brooke Lively, CFA, MBA

Director, Chief Financial Officer Services

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Note to Ally:

I know you, so I know you will make it pretier and add the CFO Services logo and such, but had to mention it. And that is a live link to my scheduler, by the way..