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Investor Communication Templates

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Writes ready-to-send investor communication templates (WhatsApp and email) for a given situation — market falls, SIP reminders, goal updates, reviews, onboarding — built on stay-the-course, no-assured-returns, education-not-tips principles. Use this to keep investors calm and informed without stepping into advice or assured-return language.

Purpose of this tool & output

Keep investors calm and informed

How the output is used

Use the templates to keep investors calm and informed, especially in volatile markets.

Important cautions

AI-generated templates; avoid assured-return or advice language unless RIA-registered.

Companion documents

- Mutual Fund Distributor Setup
- MF Client Onboarding Kit
- MF Recommendation Framework
- Portfolio Review Report
- AMFI / SEBI Distributor Compliance
- Commission & Brokerage Tracker

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.