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# Finance Delivery Client Message Swipe File

AI INNER CIRCLE · WEEKLY INTELLIGENCE

1. **Project kickoff:**
Hi [First Name], we are ready to begin your [Deliverable Name] for [Period]. Please complete this intake form so we can confirm the scope, priorities, and required files: [Form Link]

2. **Document request:**
Hi [First Name], please upload the following items for your [Period] review: [Document List]. Once received, we can move the deliverable into production.

3. **Missing document reminder:**
Quick reminder, we are still waiting for [Missing Item]. Please send it through [Upload Method] so your [Deliverable Name] can continue to the next stage.

4. **Context question:**
Before we complete the analysis, could you clarify [Specific Question]? Your answer will help us present the findings accurately in the final workbook and deck.

5. **Production update:**
Your [Deliverable Name] is now in production. We have received the required inputs and will contact you if any additional context is needed.

6. **Professional review notice:**
Your draft has entered professional review. We are checking the workbook, presentation, assumptions, and supporting references before delivery.

7. **Delivery message:**
Your approved [Deliverable Name] for [Period] is ready. You can access the files here: [Delivery Link]. Please review them before our discussion.

8. **Review booking:**
Let us walk through the findings, answer questions, and confirm the next actions. Choose a review time here: [Calendar Link]

9. **Post-review recap:**
Thanks for reviewing the [Deliverable Name] with us. The agreed actions are [Action List], with the next check-in scheduled for [Date].

10. **Renewal prompt:**
It is time to prepare your next [Deliverable Name]. Reply with any new priorities for [Next Period], then submit updated documents here: [Form Link].