Dear [Prospective Client],

As a Financial Advisor with [Name of Firm], I offer the resources and flexibility to provide you with personalized financial planning.

Financial planning is an ongoing process of preparing for and reacting to Critical Financial Events. They can be as diverse as planning for retirement, selling a business, receiving an inheritance, buying a recreational property or proactively planning for your legacy. Our resources and expertise help you to prepare for such events, so that you can achieve your financial and lifestyle goals.

During our initial meeting we will discuss your financial and lifestyle goals as well as, what you expect from the financial planning process. I will review information you need to know about me, my practice and my approach to financial planning.

The purpose of this meeting is for each of us to determine whether or not there is a fit for us to work together. In our experience, this is the foundation of a solid long-term relationship. The enclosed package will provide you with a brief introduction to us. I also bought you a book “*Stress-Free Retirement*” and would love to know your feedback on chapter 2 during our meeting. It is 5 pages, so it is a quick read. I look forward to meeting you.

Sincerely,

[Financial Advisor’s Name]

[Financial Advisor’s Title]