

# Notice to Beneficiary Regarding Financial Advisory Services

Date: [Insert Date]

To: [Beneficiary's Name]

[Beneficiary's Address]

Dear [Beneficiary's Name],

We are writing to inform you of the financial advisory services that are available to you as a beneficiary of [Trust/Estate Name]. It is important to ensure that you understand and can make informed decisions regarding the management of your financial interests.

As a beneficiary, you are entitled to receive comprehensive financial advisory services which include:

- Investment planning and management
- Tax planning strategies
- Retirement planning advice
- Estate planning guidance

Our team of qualified financial advisors is committed to helping you navigate these services to maximize your benefits. If you have any questions or would like to schedule a consultation, please do not hesitate to reach out to us.

We appreciate the opportunity to assist you and look forward to providing you with the support you need.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]