

Confirmation of Financial Planning Session

Dear [Beneficiary's Name],

We are pleased to confirm your upcoming financial planning session scheduled for:

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Location]

This session will focus on your financial goals and how we can assist you in achieving them. Please bring any relevant documents you feel may assist us in our discussion.

If you have any questions or need to reschedule, feel free to contact us at [Insert Contact Information].

We look forward to working with you!

Best regards,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]