

Dear [Beneficiary's Name],

This is a friendly reminder about your upcoming financial planning session scheduled for [Date] at [Time]. We will meet at [Location/Platform].

Please ensure to bring any necessary documents and information regarding your current financial situation to help us tailor our discussion to your needs.

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

Looking forward to our session!

Sincerely,
[Your Name]
[Your Position]
[Your Company]