

Beneficiary Planning and Consultation

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to discuss the important topic of beneficiary planning and consultation. It is crucial to have clear and organized beneficiary designations to ensure that your assets are distributed according to your wishes.

I would like to schedule a meeting to explore your current beneficiary plans and any changes you might want to consider. This discussion will help us address any concerns and clarify the necessary steps moving forward.

Please let me know your availability for a consultation, whether in person or via phone, at your earliest convenience.

Thank you for your attention to this matter. I look forward to your response.

Sincerely,

[Your Name]

[Your Title/Position]