

Request for Initial Retirement Planning Consultation

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Financial Advisor's Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Financial Advisor's Name],

I hope this message finds you well. I am writing to request an initial consultation regarding retirement planning. As I approach this significant life transition, I would like to better understand my options and develop a comprehensive plan to ensure a secure and fulfilling retirement.

Could we schedule a time to discuss my current financial situation, goals, and any recommendations you may have? I am looking forward to your expertise and guidance on this matter.

Thank you for considering my request. I look forward to your prompt response.

Sincerely,

[Your Name]