

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient's Name]

[Company's Name]

[Company's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to inquire about the financial planning services that your firm offers. I am interested in [briefly explain your needs, e.g., retirement planning, investment advice, budgeting, etc.].

Could you please provide me with more information regarding your services, fee structure, and how you tailor your financial planning approach to meet the needs of your clients? Additionally, I would appreciate any resources or materials that could help me better understand your offerings.

Thank you for your time and assistance. I look forward to your prompt response.

Sincerely,

[Your Name]