

Invitation for Initial Financial Consultation

Dear [Client's Name],

We are pleased to invite you to an initial consultation to discuss your financial goals and how we can assist you in achieving them.

Date: [Insert Date]

Time: [Insert Time]

Location: [Insert Address/Virtual Meeting Link]

During our meeting, we will cover:

- Your current financial situation
- Investment strategies
- Retirement planning
- Other financial services that may benefit you

Please confirm your availability by responding to this email or calling us at [Insert Phone Number].

We look forward to meeting you!

Best regards,

[Your Name]

[Your Title]

[Company Name]

[Contact Information]