

Retirement Financial Advisory Discussion Invitation

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. As I approach my retirement, I am looking to ensure that my financial resources are well-managed and aligned with my retirement goals. I believe a detailed discussion on financial advisory services would be beneficial at this stage of my life.

I would like to request a meeting with you to discuss my options and strategies for retirement planning, including investments, savings, and potential income sources. Please let me know your availability for the coming weeks.

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

Sincerely,

[Your Name]