

Financial Legacy Consultation

Date: [Insert Date]

Dear [Client's Name],

I hope this message finds you well. I am reaching out to discuss the opportunity for a financial legacy consultation that focuses on your long-term financial goals and the establishment of a robust legacy plan.

During our consultation, we will cover various aspects such as:

- Assessing your current financial situation
- Defining your legacy goals
- Exploring investment options
- Tax considerations and implications
- Estate planning strategies

Our aim is to create a personalized strategy that reflects your values and supports your vision for the future. Please let me know a convenient time for you to schedule this consultation.

Thank you for considering this important aspect of your financial planning. I look forward to our discussion.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]