

# Request for Financial Advisory Services

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request financial advisory services for my [personal finances/business]. As I navigate my [financial goals/current situation], I believe that your expertise will be invaluable in helping me achieve the best possible outcomes.

Specifically, I am interested in [mention specific services needed, e.g., investment planning, retirement strategies, tax planning, etc.]. I would appreciate the opportunity to discuss how your firm can assist me with these needs.

Please let me know a convenient time for you to meet or if you require any additional information from my end prior to our discussion.

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

Sincerely,

[Your Name]