

# Follow-Up on Our Initial Estate Planning Meeting

Dear [Client's Name],

I hope this message finds you well. I wanted to take a moment to follow up on our recent meeting regarding your estate planning needs. It was a pleasure to discuss your goals and concerns, and I appreciate you sharing your thoughts with me.

As we discussed, creating a comprehensive estate plan is crucial for ensuring that your wishes are carried out and that your loved ones are protected. I would like to recap the key points we covered:

- Overview of your current assets and liabilities
- Desired distribution of assets
- Choice of executor and beneficiaries
- Potential tax implications
- Importance of healthcare directives

Please review the information and let me know if you have any additional questions or if there are other areas you would like to address. I am here to assist you in putting together a robust estate plan that reflects your wishes.

If you are ready to proceed, we can schedule a follow-up meeting at your convenience to outline the next steps.

Thank you once again for your trust in our services. I look forward to hearing from you soon.

Warm regards,

[Your Name]

[Your Title]

[Your Firm's Name]

[Phone Number]

[Email Address]