Pre-Appointment Kit 2
Prospective Client Letter

Include the Prospective Client Letter with the Introduction Kit.

Note: If you typically use another term to describe what you do instead of 'Financial Planning' please change that throughout this. Some other terms include: Comprehensive Financial Planning, Integrated Financial Planning and Wealth Management.

Dear [Prospective Client],

As a Financial Advisor with [Name of Firm], I offer the resources and flexibility to provide you with personalized financial planning.

Our process is driven by personalized financial planning and includes, investment management, retirement planning, risk management, tax planning, estate planning, debt and cash flow, educational planning and philanthropy. Our process is designed to ensure that our clients never outgrow our process, they grow into it, as their lives unfold and needs evolve.

As our clients prepare for Critical Financial Events which are as diverse as planning for retirement, selling a business, receiving an inheritance, buying a recreational property or proactively planning for their legacy, our resources and expertise help prepare for such events, so that our clients can achieve their financial and lifestyle goals.

During our initial meeting we will discuss your financial and lifestyle goals and what you expect from the financial planning process. I will review information you need to know about me, my practice and my approach to financial planning.

The purpose of this meeting is for each of us to determine whether or not there is a fit for us to work together. In our experience, this is the foundation of a solid long-term relationship. The enclosed package will provide you with a brief introduction to us.
I look forward to meeting you.

Sincerely,
[Financial Advisor's Name]
[Financial Advisor's Title]