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John Smith, Attorney at Law

1000 Commerce Street, Suite 400

Sacramento, CA 94203

**RE: Mutual Client**

Dear Mr. Smith,

I am writing you today regarding a mutual client. Our firm \_\_\_\_\_\_\_\_\_\_\_\_\_ is a local financial planning firm, which specializes in Transitional Wealth Planning™, such as:

* Retirement
* Job/career transition
* Sale of real estate
* Business liquidation/sale
* Inheritance
* Change in marital status

Our mutual client asked that I reach out to you on her behalf to let you know that she has engaged our financial planning services team. One of the ways we help our clients is by collaborating with their other trusted advisors (such as yourself) to create a holistic approach to financial planning. We can provide important information to you on behalf of our mutual client, including if appropriate updates to the “Schedule A” of their Revocable Living Trust. To that end, I would greatly appreciate the opportunity to meet with you for a cup of coffee or lunch (I’ll host) to discuss the services we will be offering our mutual client. I’m also very interested in your services and areas of focus and specialties.

I will send you an email under separate cover to provide some availability for the coming few weeks. If you would like to speak with me before, please contact me at: (805) 888-7777 or [financial.advisor@advisoryfirm.com](mailto:financial.advisor@advisoryfirm.com) to let me know when you would be able to get together.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_

Financial Advisor, Advisory Firm Date