Invitation to Estate Planning Meeting

## SUBJECT LINE: What is your generational plan?

## BODY: I’m reaching out because there’s an important topic that I think it’s time to discuss. As your advisor, one of my biggest priorities if to help you live comfortably off your assets and income (and making sure those assets continue to grow) – but there’s also the matter of determining what you plan to leave to future generations. Is this something you’ve taken any time to consider?

## Generational planning is a big topic and can often be very sensitive, which is why I’d love to connect with you to have a more in-depth conversation. Would you be available to talk in-person or over the phone in the near future?