

(Date)

(Name)

(Address)

Dear (Client).

Providing your family with an organized source of answers and information about everything from your investment strategies to your wisdom is perhaps the most caring legacy you can leave behind at your death.

Perhaps you have already had an opportunity to be involved in the settlement of a loved one's estate, perhaps a parent or other close relative. It is no easy task taking on the role of Administrator or Executor. Searching for information can be a daunting task.

There are nearly 100 decisions to be made by the survivors immediately following a death, along with other matters that will have to be settled and dealt with in the months and years to follow. Most of these can be handled efficiently—*if* the dearly departed left some sort of all-in-one-place, *who to call first, what to do first* and *where to find it* guide for his or her surviving heirs and loved ones.

Life is full of “**if-only's**.” If only they would have left me with more information. If only they had a Health Care Declaration, or a Durable Power of Attorney. If only he would have told me. If only I would have taken more time to ask questions when I had the chance.

As your financial advisor, it is one of my responsibilities to make sure that not only you, but your family is well prepared for any emergency, including death.

With this in mind, enclosed you will find a copy of **The Beneficiary Book**, which is one of the best gifts you can give your family. There is plenty of room in it for you to share your feelings about anything you want to say.

I am inviting you to complete **The Beneficiary Book** to make sure that your family knows what to do. If there are issues that need to be resolved, let's resolve them. If there are things to complete, let's complete them. Let's make sure that if a catastrophe occurs, or you leave the house one morning for the last time that everything is in order.

I will give you a call to set up a time to discuss the process with you.

With peace and love to your family,

(Financial Advisor)