Hi \_\_\_\_\_\_, it's \_\_\_\_\_. Since you and \_\_\_\_\_ have been such great clients of mine for years, I wanted to provide a gift that I believe you would find useful for your legacy planning. It's a Financial Organizer that I think is invaluable. One place where you can put all of your necessary plans and papers. For instance, your will, your directives for physicians and durable power of attorney. Assets transferred and deeds, along with location lists like passwords and safe deposit information. Property agreements, life insurance statements and explanation of your plans are included as well.

When would be a good time to bring this out to you and \_\_\_\_\_\_\_\_. I'm open on \_\_\_\_\_ afternoon. Are you?