## **Invitation Letter**

## This letter is for the Preferred Client and Guest

Client Name:

Client Address:

Date:

[Advisor] of [Firm]

Now Presenting Personal Financial Planning Workshops for Clients

Dear [Client]:

I am pleased to announce that we are now offering our preferred clients personal Financial Planning Workshops - (name of your Workshop series).

These Workshops are designed to be given in an informal setting for small groups. This allows me to focus on the needs of the particular group and ensures that your questions and concerns are addressed throughout the Workshop sessions. The material in the (name of your Workshop series) will provide you with an excellent introduction to various aspects of financial planning. Each Workshop is followed by a personal consultation to determine exactly how this information can be applied in your individual situation.

Please contact me at xxx-xxx-xxxx for more information on (name of Workshop series), (and times and dates the Workshops will be offered over the next few months.) You will receive an invitation outlining the topics to be covered for the various sessions. I would encourage all my preferred clients to attend at least one of the Workshops over the next six months.

As you become aware of the various topics being covered in (name of Workshop series) you may think of friends, family or associates who could benefit from the information being discussed. Guests are welcome to attend. As space is limited to not more than 14 individuals per session, we do request that you RSVP for yourself and your guests.

I am confident that this Workshop will greatly benefit you and your family, and I encourage all my clients to take advantage of this unique opportunity.

Yours sincerely,

[Advisor] PS.

\*attach your workshop schedule