

[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

Welcome to Your Comprehensive Legacy Protection Plan

Thank you for choosing [Company Name] to assist you in securing your future and protecting your family's heritage. We are honored to partner with you in creating a robust legacy protection strategy.

The goal of this plan is to ensure that your assets are preserved, your wishes are honored, and your loved ones are provided for according to your exact specifications. This welcome package includes the following initial documents:

- Your Client Engagement Agreement
- A Roadmap of the Legacy Planning Process
- A Checklist of Required Information and Documents
- Contact Details for Your Dedicated Support Team

Next Steps:

Our team is currently reviewing the information provided during our initial consultation. We will contact you on [Date/Time] to schedule your Strategy Design Session. In the meantime, please begin gathering the items listed in the enclosed checklist.

Should you have any immediate questions, please do not hesitate to reach out to us at [Phone Number] or via email at [Email Address].

We look forward to helping you build a lasting legacy.

Sincerely,

[Signature]

[Name of Principal/Advisor]
[Title]
[Company Name]