

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

As a valued client of [Bank Name] Private Banking, we are pleased to invite you to an exclusive seminar: **"Legacy and Lifestyle: Strategic Retirement Planning for the Ultra-High-Net-Worth."**

This private event is designed to address the complex financial considerations of our most distinguished clients. Our expert speakers will cover advanced topics including:

- Tax-efficient wealth transfer strategies
- Customized portfolio management for retirement longevity
- Health and legacy planning in a shifting global economy

**Event Details:**

Date: [Date of Event]

Time: [Start Time] (followed by a private dinner at [Time])

Location: [Venue Name/Hotel]

Address: [Venue Address]

Seating is strictly limited to ensure an intimate setting for discussion. Please confirm your attendance by [RSVP Deadline Date] by contacting your Private Banker, [Banker Name], at [Phone Number] or by replying to this email.

We look forward to hosting you for an evening of insightful discussion and networking.

Sincerely,

[Signature]

[Name of Executive]

[Title]

[Bank Name] Private Banking