**To be placed on your approved letterhead or use with your approved email signature. Tracking number is 436228.**

Subject: Take Care of Your Family with 25 Documents You Need Now

Dear Client,

While nothing can ease the burden of losing a loved one, preparing for the inevitable can help ease the burden for those closest to you.

To help you navigate this tough discussion, I wanted to share with you the *25 Documents You Need Now Checklist* to serve as framework to help you tackle the many decisions and tasks involved in end-of-life planning.

I would love the opportunity to sit with you to take a deeper dive into your planning needs utilizing these helpful documents. Together, we develop a plan to help you create a legacy that’s most meaningful for you and your loved ones.

Please call or email me today to set up a time that works best with your schedule. I look forward to hearing from you soon!

Best regards,

(Advisor Name)