

Date

<First Name> <Last Name>

<Address>

<City> , <State> <Zip>

Dear <Salutation>,

I wanted to share this quick thought with you.

Contrary to the popular saying, money does not buy you happiness. What it buys you is time – time to pursue other endeavors, to enjoy life and to help others. This is the true purpose of wealth, to make a difference in your life and the life of others less fortunate than yourself.

This can be accomplished in many ways, from the simple (giving money to a charity, for instance) to the complex (setting up trusts, foundations, etc.). However, it may be done, you are limited only by your imagination and your motivation to make a difference.

In creating and re-directing wealth, we are ready to help you with your wealth preservation needs. Once financial security is achieved, you may decide to look into what you can do to make a difference in the world around you. For this, having the advice of a competent and trusted advisor is crucial.

Please feel free to call us to schedule a private consultation on your charitable ambitions. We look forward to helping you achieve this next step in your life.

Warm regards,

<Advisor Name>

<Title>