**STEP 1**

**Client’s Names**

**Client’s Address**

**Client’s Address**

**Dear Jane & Mike Smith,**

This is to look like stationary from your client. I use a gray cotton paper with matching envelope. I have 20 of these in my 2-pocket folder at the business development meeting.

Financial planning is one of those areas most people intend to do, but somehow, many never get around to it. For some reason, it's difficult to take the initiative and move forward in this important area. Josh Rhodes is my financial professional and he approaches the task of financial planning in a straightforward way. He is very relaxed in his entire approach and I would like to introduce him to you.

We have enclosed an informational brochure that explains a bit more about the services Josh provides.

-finny is very thorough and may give you some ideas like he has for me on how to organize your financial life. We hope you make the time to get together with Denny so you can decide for yourself if he can help you achieve your goals even more effectively.

Best Regards,

(Your client signs here)

P.S. We would like to give your name and phone number to Dean so that he can contact you. Please let us know if you would prefer that we do not do this.

I print the body of the letter for the client to sign. I then run the letter back through the printer and print the clients name and address, and the "Dear..." part of the letter.

**Sincerely,**

**Bob and Sally Woodward**

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