

Template for covering letter/email when sending articles

The following email template is for you to use with clients - feel free to personalise it.

Please note that if you use this email content, or similar text for any reason, you are responsible for ensuring that it's compliant. While every care has been taken to ensure the accuracy of the following information, Prudential can accept no liability if you decide to use it.

[Hello, Client Name]

Most of us have had our lives transformed recently. This is perhaps one of the reasons why more of my clients are asking me about estate planning.

We all want our money and valuables to go to the people we love. Unfortunately, some pretty complicated rules around estate planning means that doesn't always happen.

Looking at how and when to pass on your wealth to your loved ones is such an important part of financial planning. And planning early enough can help to reduce or eliminate the tax paid later on. Just so you know, tax rules can change and the impact of taxation and any tax relief depends on your circumstances.

It can be a complex subject, but I'm here to help. I've attached a short article from Prudential to introduce you to some things you might need to consider. When you have time, please have a read. We can talk about what it means for you personally when we next chat.

Of course, if you have any questions or you want to talk about this now, please reply to this email or call me on **[INSERT PHONE NUMBER]**

[Closing sign off]

[Signature]