**Customize this email template to introduce the importance of legacy planning and outline your services with existing clients and/or prospects.**

**\*Don’t forget your CASL obligations before sending any marketing emails \***

Dear [Client/prospect name]:

[Client: Congratulations on your daughter’s recent graduation / son’s wedding / buying a home / other milestone. I’m so happy for you/to hear about this achievement.] / [Prospect: It was so nice to meet/speak/connect with you on [insert date]. I’m following up on our conversation about [insert topic].

Now might be a good time to discuss your legacy plans. Talking to your family about legacy planning isn’t always straightforward or easy, but I have the resources, tools and solutions to help.

Watch this [video](https://sunlife.hubs.vidyard.com/watch/h9tm7wZPtvhgz5UJ98ZQzf?) and see why your legacy is important.

I believe that it’s better to start planning now, rather than putting it off into the future. Here’s why:

I read that most Canadians plan to share some wealth in the form of an inheritance. But many haven’t had a discussion with family members or loved ones who are going to inherit this wealth.\* If you don’t tell anyone about your vision for the future, it might not happen.

Let’s have a chat about protecting your wealth and leaving a legacy.

Please send me an email or call if you’d like to learn more.

Regards,

[advisor name]

[advisor email address]

[advisor phone number]

\*51% of Canadians expect to transfer wealth, but 47% haven’t discussed it with their heirs. Survey findings from Canadian Imperial Bank of Commerce (CIBC), 2015.

[unsubscribe statement]

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