

[Your Name/Company Name]
[Your Address]
[City, State, Zip Code]
[Your Phone Number]
[Your Email]

[Date]

[Recipient Name]
[Recipient Address]
[City, State, Zip Code]

Subject: Strategic Consultation Regarding Your Capital Gains Opportunities

Dear [Recipient Name],

I am writing to invite you to a private consultation to discuss strategic options for managing your recent or upcoming capital gains. With current shifts in tax legislation and market volatility, there are several time-sensitive opportunities available to help you defer, reduce, or potentially eliminate tax liabilities associated with the sale of your assets.

During our brief consultation, we will review:

- Tax-efficient reinvestment strategies.
- Eligibility for Opportunity Zone credits or 1031 exchanges.
- Methods to maximize your net proceeds from asset liquidation.
- Customized timelines for your specific financial goals.

Our goal is to ensure you retain as much of your hard-earned equity as possible while aligning your portfolio with your long-term objectives.

Please let me know if you are available for a 15-minute call or meeting on [Date] at [Time], or feel free to suggest a time that works better for your schedule.

I look forward to hearing from you.

Sincerely,

[Your Signature]

[Your Printed Name]
[Your Title]