

[Your Name]  
[Your Title/Company]  
[Your Phone Number]  
[Your Email]

[Date]

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

Dear [Recipient Name],

It was a pleasure speaking with you the other day about your current living situation and your future goals. As we discussed, moving to a smaller home is not just about changing your living space; it is a strategic financial decision that can significantly impact your retirement or investment portfolio.

I wanted to follow up with a summary of the key financial benefits we touched upon regarding downsizing:

- **Equity Release:** Selling your current larger home can unlock a significant amount of liquid capital that can be reinvested or used to fund your lifestyle.
- **Reduced Monthly Expenses:** A smaller property typically results in lower utility bills, decreased property taxes, and lower homeowners insurance premiums.
- **Lower Maintenance Costs:** Fewer square feet and smaller outdoor areas mean less money spent on repairs, landscaping, and general upkeep.
- **Tax Advantages:** Depending on your specific situation, you may be eligible for capital gains exclusions on the sale of your primary residence.

By streamlining your housing costs, you can redirect those funds toward travel, family, or other long-term financial objectives. My goal is to help you determine exactly how much you could save and gain through this transition.

I have attached a brief market analysis of your current home's value and some examples of smaller properties currently available in your preferred areas. I would love to schedule a brief call next week to review these numbers in more detail.

Please let me know which day works best for you.

Best regards,

[Your Signature]

[Your Printed Name]