

Subject: Protecting [Child's Name]'s Future

Dear [Client Name],

Congratulations again on the arrival of [Child's Name]! This is such an exciting time for your family.

As you settle into your new routine, I wanted to share a resource that many of my clients find invaluable during this transition. Now that your family has grown, ensuring your financial legacy and "wealth protection" is more important than ever.

I would like to introduce you to [Referral Name] from [Company Name]. They specialize in helping new parents with:

- Setting up or updating Wills and Living Trusts.
- Naming legal guardians for your children.
- Life insurance strategies to provide long-term security.
- Education savings plans (529 plans).

I have worked closely with [Referral Name] and trust them to provide the same level of care and professionalism that you expect from my office. They offer a complimentary initial consultation to review your current situation.

If you are interested, I can facilitate an email introduction, or you can reach them directly at [Phone Number/Email].

I look forward to catching up with you and the family soon.

Best regards,

[Your Name]

[Your Company]

[Your Phone Number]