Dear <Client Name>,

I hope you and your family are doing well and staying safe during these crazy times.

I wanted to reach out to arrange a convenient time for us to talk about any concerns you may have about your financial situation and the impact COVID-19 is having.

I have recently started using professional financial planning software to illustrate the short, mid and long-term impact market returns are having on retirement plans. The software has a client version that you can use to do a basic retirement analysis in under 5 minutes.

Click the link at the bottom of this email and answer a few questions, then share the result with me so that I can suggest possible strategies to help you achieve your financial goals. Also, if you have any friends or family that are concerned about their retirement, feel free to share the link and I will do my best to help them.

All the best,

<Advisor Name>

Click here to calculate your retirement potential.