

# PROSPECT/CLIENT LETTER

Date

Prospect Name  
Address  
Address

Subject: What's your Money Personality?

Dear Prospect,

I'm excited to announce that **Your Firm Name** is now a certified 5 Money Personalities Advisor!

What does this mean for you?

By discovering your own Money Personalities, you'll gain a new perspective of yourself and the way you deal with money. In turn, we'll be able to talk about your money like never before!

It all starts with the Money Personalities quiz at (insert your website).

This innovative program was developed by a team of financial advisors, marriage counselors, and statisticians.

Once we know your primary and secondary Money Personalities, we can view how and why you make financial decisions from an entirely new angle, and discuss how your results might impact future financial decisions.

If you're ready to begin this journey of understanding yourself and your money habits better, I urge you to set some time aside to take the quiz before our next meeting.

I can't wait to introduce you to your Money Personalities!

Best,

Agent/Advisor name  
Contact Information