

Letter Head

Date

Client
Address
City, State, Zip,

Re: Mortgage Services & Complimentary Mortgage Analysis

Dear Client,

As a valued client of COMPANY NAME, we are always looking to keep you apprised of innovative and progressive products and services. Our goal is to keep our “finger on the pulse” of programs that will assist our clients in improving their financial situation, increase your return on investment, and leverage your assets.

As your CPA/Financial Planner, I have decided to expand my services to include assisting you with your real estate related needs. I have formed an alliance with Pacific Coast Lending. To introduce this service, I would like to offer you a complimentary mortgage analysis of your current mortgage to ensure you are in the best loan program available and to enable me to manage your needs on an annual basis.

I am excited about this affiliation and look forward to assisting you with all your residential and commercial financing needs. Please feel free to contact me to discuss this service.

Best regards,

NAME
COMPANY NAME

Please note: This announcement is for informational purposes only and is not a solicitation.