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| Company Name |
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[Date]

Dear [CPA’s Name],

We just wanted you to know that we value you and what you do for us for us each year at tax time. We have complete trust in you.

We know you are busy, but we have a request of you. In an effort to streamline and make our overall financial picture work more efficiently, we would ask that you let our financial advisor [Advisor’s name] take you out to lunch. Of course, this would be at your convenience.

We would like all of our professionals to have met, so it is easier for them to work together on our financial affairs. When we and our financial advisor talked about this, he actually volunteered to pay for your lunch!

Thank you very much for your consideration on this. [Advisor’s name] said he would reach out to you to see when it would be convenient for you two to meet.

Thanks! Be well,

[Client’s name and Contact Info]