## **Advisor to Client E-mail Template**

**Subject:** Enhancing Your Family's Future: Invitation to Participate in a Study

Dear [Client Name],

Subject: Strengthening Family Dynamics and Goal Setting: An Opportunity to Participate in a Research Study

Dear [Client Name],

I'm writing to you today about an exciting opportunity that I believe aligns perfectly with the comprehensive financial planning we've been working on together: a research study focused on strengthening family dynamics and goal setting. This study is conducted for a doctoral thesis on the effects of a structured process on advice quality at SDA Bocconi, a business school in Milan, Italy. The study is conducted by Nicholas Schwarz - website https://thececilygroup.com.

As you know, financial well-being is deeply intertwined with the overall health and harmony of your family. This study explores the effectiveness of the "Family Council Canvas," a powerful tool designed to improve family communication, clarify shared goals, and build a stronger foundation for your family's future.

**Why I think this study is valuable for you:**

We've discussed the importance of [mention a specific goal or concern you've discussed with the client, e.g., passing on values to the next generation, ensuring clear communication within the family regarding finances, etc.]. This study offers a structured approach to addressing those very concerns.

**What is the Family Council Canvas?**

The Family Council Canvas is a framework designed to facilitate meaningful family conversations around:

* **Family Values:** Defining what matters most to your family.
* **Goals:** Setting shared objectives for the future.
* **Communication:** Improving how your family communicates.
* **Roles and Responsibilities:** Clarifying expectations within the family.
* **Legacy:** Discussing how your family wants to be remembered.

**Why participate?**

* **Strengthen Family Bonds:** Enhance cohesion and build resilience.
* **Improve Communication:** Create a safe space for open and honest dialogue.
* **Clarify Goals:** Work together to define and achieve your family's aspirations.
* **Contribute to Meaningful Research:** Help us understand how families can thrive.

The study involves completing an online questionnaire and, if you wish, participating in a follow-up interview. All information shared will be kept confidential.

If you're interested in learning more or participating in this study, please let me know. I'm confident that this is a valuable opportunity to strengthen your family and build a more secure financial future.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]

## 