(NAME), there’s something I’ve been wanting to run by you for quite some time, but was reluctant to make you feel uncomfortable in any way. As you might already realize, I do some pretty important work for my clients. I help them gain a high level of confidence, clarity, and control over their personal finances.

Obviously, this type of work is very personal and confidential. I just want to make sure that whatever advise you are currently getting is as complete and of the highest caliber possible. Would you be open to sitting down with me at some point get a complimentary assessments of your situation? I promise that no other member of our family will become privy of our conversation.