

Hey [Name],

As someone who helps advisors **[insert your expertise or how you support them—e.g., “build stronger client connections through wellness” or “elevate their marketing with more authentic messaging”]**, I’m always on the lookout for tools that can help me help you!

That’s why I wanted to share **The Passport Package™** with you. It’s a quick 5-minute assessment your prospects or clients take that gives you clear insight into what they care about most—their mindset, their motivations, and how they think about life.

This helps you create full-focused conversations, build stronger relationships, and enhance your human-first planning experience for your clients.

Whether you're working with a prospect, new clients, preparing for annual reviews, or trying to re-engage quiet households, The Passport Package™ helps you meet clients where they are—and move forward with where they want to be.

We think it’s awesome and had to share it with you!

If you want to learn more about it, you can experience it yourself!

Take the assessment here: [The Passport Package™](#)

Or better yet, set up [a 15-minute call](#) with the C&J team to see if this could be a right-fit for your practice.

Mention my name to receive partner pricing!

I’d love to hear what you think and how you see it fitting into your work with clients.

Talk soon,

[Your Name]

[Your Company Name]