

Personalized ABM Prospect Outreach Email

Common Contacts	Profile	Created at	Updated at	Personalized Content Hub Tags
Brad Tarter from David White and Associates	https://catchlight.ai/leads/56836921-c249-47e7-8ed2-8cdaeb538ab1	26-Aug-2022	26-Aug-2022	#Children, #Charitable Giving, #Real Estate, #Inheritance, #Mixed Nationality Couples

Subject: Following Up from U.S. Social Security Webinar

Hi Luke,

I wanted to reach out and say 'thank you' for you attending my recent webinar on 'Claiming Social Security from Australia.'

As an American in Australia, you may well have the best of both worlds but there's a great many things financially you need to be aware of living such a cross-border life. If it's OK with you, I'd like to send you about half a dozen emails over the coming weeks that pertain to your US/Australian cross border life. Such topics include how U.S. inheritances are taxed in Australia, issues that come up for mixed nationality couples, financial planning for children of the globally mobile and tax efficient charitable giving across borders. I've also written content on investment issues that affect Americans abroad and issues to consider as an American investing in Australian Real Estate. If you'd rather not hear all of this I apologize for taking your time and I'll be sure to remove you from this list. If I don't hear from you, I'll assume it's OK to send you a few, highly personalized emails.

Best wishes,

Ashley.

PS: By the way, do you happen to know Brad Tarter? He popped up as a common connection on LinkedIn. I can see from there that like Brad, you also went to Bellarmine and Chico State. Brad and I were friends from a former financial advisor company I worked at in the Bay Area.

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