## **A picture containing text, electronics, display, picture frame Description automatically generatedClient Transition Welcome Card Sample**

Send the Welcome Card after the client has signed and returned all documentation associated with opening their new accounts and the transfer process to the new firm is underway. The target date is **one week** after becoming a fully transitioning client.

Handwrite the note.

Great cards found at [www.lavishcards.com](http://www.lavishcards.com)

Refer to the sample, below:

*Dear [Transitioning Client],*

*Just a quick note to say Welcome Aboard!*

*As you know, we are excited about our new beginning here and we want to sincerely thank you for your trust and confidence in continuing to work in partnership with us. We look forward to continuing our great relationship with you.*

*[Insert personal note based on Client Profile] (don’t think we’ve been using ‘FORM’ at Mindset?)*

*As always, feel free to call us anytime!*

*Sincerely,*

*[Advisor’s Signature]*