Realignment Follow-Up Email

*Target timeframe for delivery is* ***Same Day or Next Day*** *after the Transition Meeting to solidify the realignment.*

*Refer to the sample template below.*

*This email is sent by the New Advisor.*

Dear [Client Salutation]:

Thank you for taking the time recently to meet with us – it was great to meet/see you.

As you know, we have made enhancements to ensure our clients are receiving the **highest quality of care** as well as, **prompt, professional and more personalized financial guidance,** which means I now have the pleasure of working closely with you.

I am looking forward to taking exceptional care of you and your family going forward and I will be your first point of contact for anything related to your investment and wealth management needs.

As always, if you have any questions, please feel free to contact me.

P.S. ‘Add something meaningful related to family, occupation, recreation if appropriate.’

Yours truly,

[New Advisor]