Re-Welcome Letter

Step 10

*Target timeframe for delivery is* ***Week 2*** *after your existing client receives their PFO Binder.*

*You may have a simple one or two-pager available you’d like to include which reinforces your approach to comprehensive wealth management. This would be the same item you include for the Welcome Process with New Clients.*

June 21, 2021

Name

Address

Address

Dear [Client],

We would like to thank you for taking the time recently to update your relationship with us.

Our Client Focus

We take great pride in the work we do with you and we are fully committed to focusing on what matters most to you. We appreciate that you have entrusted us to help you simplify, organize, and coordinate all aspects of your wealth management. We look forward to a long relationship with you as we work together to help you achieve what is important to you.

A Dedicated Team to Serve You

As you know, we have a team available to assist you and they are committed to ensuring you receive exceptional service. Our team includes:

[Name], Client Service Coordinator: 555-6666

[Name], Administrative Assistant: 555-7777

We also have relationships with other professionals who may be of use to you from time to time. Feel free to call us for a recommendation should you need one.

As always, feel free to contact us any time we can be of service to you.

Sincerely,

Advisor’s Name

Advisor’s Title