Client Realignment Letter/Email – Existing FA

Date

Name

Address

Address

Dear [Client Salutation]:

We are delighted to share that we have made important enhancements to our practice as it relates to our approach to wealth and investment management for our clients. The purpose of these enhancements is to ensure our clients are receiving the **highest quality of care** as well as, **prompt, professional and more personalized financial guidance.**

Due to our passionate commitment to meaningfully helping our clients, it was becoming clear that to properly manage all our clients, we had to enlist the support of an exceptional Advisor who will ensure our clients continue to be serviced in the manner in which we **know they deserve to be**.

We have carefully reviewed all our clients based on their current investment and wealth management needs to align them with the Advisor on our team best suited to meet their needs. I’m delighted to let you know that **New FA** is going to be joining us at our next Review Meeting and they are looking forward to working with you.

I realize **New FA** needs no introduction as you are already aware of who he/she is and have already worked with them in many capacities. Nevertheless, we have included a biography so you can see that his/her education and experience are well-aligned with your needs. We know he/she will take exceptional care of you and your family going forward. They will be your first point of contact for anything related to your investment and wealth management needs.

We continue to work collaboratively as Advisors, and I remain the overseer as it relates to our core investment and wealth management philosophies for all clients. If **New FA** is ever away on holidays or for any other reason, and you are in need of guidance related to your investment or wealth management, I will be more than happy to assist you.

**New FA** is looking forward to working with you and is committed to proactively helping you achieve your wealth and lifestyle goals.

Yours truly,

[Former Advisor]

Encl.