Welcome Card

Step 15

*Target timeframe for delivery is* ***Week 1*** *after becoming a new client.*

*Handwrite the note. Use a stunning, memorable card. Refer to the sample below.*

Dear Client,

Just a quick note to say Welcome Aboard!



We appreciate your trust and confidence, and look forward to working in partnership with you.

[Insert personal note based on Client Profile information]

Sincerely,

Advisor's Signature