Prospective CLIENT LETTER

Kit 2

***Note:*** *If you typically use another term to describe what you do please change that throughout this document to ensure consistency in your branding. The term you use should position you beyond being simply an ‘investment advisor’ and should suggest a range of solutions you can offer to your clients.*

March 24, 2023

Name

Address

Address

Dear [Prospective Client],

We are committed to helping our clients simplify, organize and coordinate all aspects of their Wealth Management. In other words, we help our clients connect the dots in their complex world of wealth and investments to achieve the financial piece of mind they are looking for.

We view Wealth Management as an ongoing process of preparing for and reacting to Critical Financial Events. This can be as diverse as planning for retirement, selling a business, receiving an inheritance, buying a recreational property or proactively planning for your legacy. Our approach helps clients understand how to achieve their financial and lifestyle goals. This approach also has us working in collaboration with other professionals.

The enclosed package will provide you with a brief introduction to us. As I mentioned, we will follow up shortly to arrange an initial meeting. During that initial meeting, I review important information you need to know about us and our approach to wealth management, and of course, answer any questions you might have. We will spend most of our time together, however, discussing your wealth and lifestyle goals, and what you expect from the wealth management process.

The purpose of the initial meeting is for each of us to determine whether there is a fit for us to work together. In our experience, this is the foundation of a solid long-term relationship.

I look forward to meeting you.

Sincerely,

Advisor’s Name

Advisor’s Title