Kit – Handwritten Card for Existing Clients

Step 3

*This stunning greeting card is to be handwritten and attached to your Introduction Kit.*

*To simplify things, we recommend you use the same card you send with the Introduction Kit for Prospective New Clients. You can earmark a specific card image as “Accompanies Introduction Kit”.*

Dear Existing Client,

**I hope all is well and look forward to catching up with you soon.

Here is the Introduction Kit we mentioned. We send this out now before we meet with a prospective client for the first time as part of our process.

See you soon,

Advisor's Signature