Welcome Letter

Step 15

*Target timeframe for delivery is* ***Week 2*** *after becoming a new client.*

*You may have a simple one or two-pager available you’d like to include which reinforces your approach to comprehensive wealth management.*

May 2, 2023

Name

Address

Address

Dear [Client],

We would officially like to welcome you aboard!

Our Client Focus

We take great pride in the work we do with our clients and 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 so you always have the complete picture. An important part of this will be assisting you with any critical financial event that you may encounter in the years to come.

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 a variety of other professionals that may be of use to you as your needs unfold. If you ever have such a need, feel free to reach out and we would be pleased to make an introduction.

Again, we look forward to helping you achieve your goals and objectives.

Sincerely,

Advisor’s Name

Advisor’s Title