Kit - Cover Letter for Existing Clients

Step 3

*Include the Cover Letter with the Introduction Kit being sent to your existing client.*

May 5, 2023

Name

Address

Address

Dear [Existing Client],

In the spirit of ongoing improvement, we have spent the past several months reviewing all aspects of our advisory practice to ensure we deliver an exceptional client experience. To that end, we are officially launching some enhancements to our client experience which we believe will provide additional clarity and peace of mind for you.

We remain committed to helping our clients achieve what is important to them and an extension of this is helping them simplify, organize and coordinate all aspects of their wealth management.

In the process of helping our clients achieve their goals, we will of course continue to assist clients in navigating through the various Critical Financial Events of their lives. These can be as diverse as retiring, receiving an inheritance or buying a new home. As you know, our resources and expertise are available to help you to prepare for such events, to ensure that your game plan is a solid one to help achieve your wealth and lifestyle goals.

Prior to our upcoming appointment, we wanted to provide you with the enclosed package to ensure you’re up-to-date with regards to our practice and how we’re here to help you. We will review the enhancements we have made and answer any questions you have during our upcoming appointment.

We look forward to seeing you in our upcoming meeting.

As always, if you have any questions feel free to contact us anytime.

Sincerely,

Advisor’s Name

Advisor’s Title