**Re-Welcome Card** Step 9

Step 9

*Target time-frame for delivery is* ***Week 1*** *after your existing client receives their PFO Binder.*

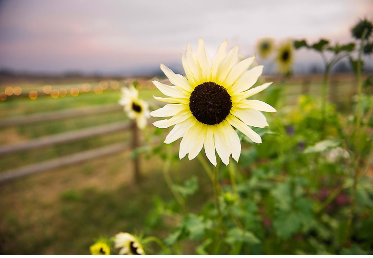
*Handwrite the note. Use a stunning, memorable card. Refer to the sample below.*

*To simplify things and to be consistent with your process, we recommend you use the same card you send to your New Clients in the Welcome Process. You can ear-mark a specific card image as “Welcome Card”.*

Dear Client,

It was great to have the opportunity to reconnect with you recently.

I just wanted to say thanks for your continued trust and confidence, and that I truly value our relationship.



*(personal note if appropriate)*

As always, let me know if there's anything I can do for you!

Sincerely,

Advisor's Signature

Step 9