## **Client Transition Letter or Email Template #1**

[Date]

Dear Valued Client,

We are excited to announce that we have changed firms to [name of new firm], effective [date].  As our firm continues its steady growth, we felt we needed to find a strategic partner that is aligned with our philosophy, planning strategy and process to best service our clients. After an extensive due diligence process, we decided [name of new firm] was the right fit for us. [Name of new firm] is [list 2-3 reasons for selecting this firm. Examples include:].

* Not transactional or product focused
* Client-centered with an emphasis on the client experience
* Panoramic with an approach that enables us to put every piece of the financial puzzle together

You can expect to be receiving new account paperwork via email in the near future. The new account process should be quite easy with the electronic signature feature available to our clients. As we will be unable to service your account until the assets are at [name of new firm], it is imperative that you sign & return the forms quickly so your assets can be transferred from [former name of firm] over to [name of new firm].

If you have questions, please call our office. We are grateful to have you as a client and we thank you for your partnership with us.

Sincerely,

[Advisor’s Name]

[Advisor’s Title]