Re-Welcome Gift

Step 11

*Target timeframe for delivery is* ***Week 3*** *after your existing client receives their PFO Binder.*

*Handwrite the note. Refer to the sample below.*

*To simplify things and to be consistent with your process, we recommend you use the same Welcome Gift you send to your New Clients in the Welcome Process.*

Dear Client,

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We want to take this opportunity to thank you once again for taking the time recently to come in and update your relationship with us. We sincerely appreciated your time and enthusiasm.

As a token of our appreciation, we hope you enjoy the [Gift Item].

As always, feel free to call us anytime.

Sincerely,

Advisor's Signature