**Client Transition Letter or Email Template #2**

[Date]

Dear Valued Client,

We are excited to announce that after an extensive due diligence process, we have changed firms to [name of new firm] effective [date].  We take pride in providing consistent proactive and reactive service to our clients, but we can’t get complacent; we know we have to continually strive to raise the bar. We felt [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

For our clients, 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.  It is imperative that you sign the forms quickly so your assets can be transferred from [former name of firm] over to [name of new firm].  We will be unable to service your account until the assets are at [name of new firm].

If you have questions, please call our office.  We are grateful to have such wonderful clients and we thank you for your partnership with us.

Sincerely,

[Advisor’s Name]

[Advisor’s Title]