Client Realignment Letter/Email – New FA

Date

Name

Address

Address

Dear [Client Salutation]:

We are delighted to share with you that we have made important enhancements to our practice as it relates to our overall approach to wealth and investment management for our clients. The purpose of these enhancements is to ensure our clients are receiving the **highest quality of care** as well as, **prompt, professional and more personalized financial guidance.**

Due to our passionate commitment to meaningfully helping our clients, it was becoming clear that in order to properly manage all of our clients, we had to enlist the support of an exceptional Advisor who will ensure our clients continue to be serviced in the manner in which we **know they deserve to be**.

We have carefully reviewed all our clients based on their current investment and wealth management needs to align them with the Advisor on our team best suited to meet their needs. I’m delighted to let you know that **Brand New FA** is going to be joining us at our next Review Meeting and they are looking forward to working with you.

As you are aware, **Brand-New FA** recently joined our team, and you may have already had some interactions with him/her. We have included a biography so you can see their education and experience are well-aligned with your needs. We know he/she will take exceptional care of you and your family going forward. They will be your first point of contact for anything related to your investment and wealth management needs.

We continue to work collaboratively as Advisors, and I remain the overseer as it relates to our core investment and wealth management philosophies for all clients. If **Brand New FA** is ever away on holidays or for any other reason, and you are in need of guidance related to your investment or wealth management, I will be more than happy to assist you.

**Brand New FA** is looking forward to working with you and is committed to proactively helping you achieve your wealth and lifestyle goals.

Yours truly,

[Former Advisor]

Encl.