Welcome Letter

Step 15

*Target timeframe for delivery is* ***Week 2*** *after becoming a new client.*

*You may have a simple one or two-pager available you’d like to include which reinforces your approach to comprehensive wealth management.*

June 14, 2021

Name

Address

Address

Dear [Client],

We would officially like to welcome you aboard!

Our Client Focus

We take great pride in the work we do with our clients and are fully committed to focusing on what matters most to you. We appreciate that you have entrusted us to help you simplify, organize and coordinate all aspects of your wealth management. Although we already began helping you, we look forward to assisting you with any critical financial event that you may encounter in the years to come.

A Dedicated Team to Serve You

As you know, we have a team available to assist you and they are committed to ensuring you receive exceptional service. Our team includes:

[Name], Client Service Coordinator: 555-6666

[Name], Administrative Assistant: 555-7777

We also have relationships with other professionals who may be of use to you from time to time. Feel free to call us for a recommendation should you need one.

As always, feel free to contact us any time we can be of service to you.

Sincerely,

Advisor’s Name

Advisor’s Title