Re-Welcome Card

Step 9

*Target timeframe for delivery is* ***Week 1*** *after your existing client receives their PFO Binder.*

*Handwrite the note. Use a stunning, memorable card. Refer to the sample below.*

*To simplify things and to be consistent with your process, we recommend you use the same card you send to your New Clients in the Welcome Process. You can ear-mark a specific card image as “Welcome Card”.*

Dear Client,

Thank you for your continued trust and confidence. The process we have just gone through will be of great benefit to you now and over the coming years.

I look forward to continuing our partnership.

Feel free to call anytime.

Sincerely,

Advisor's Signature