**Handwritten Card**

*Target timeframe for delivery is* ***Week 1*** *after the Transition Meeting to build trust and rapport.*

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

*This card is sent by the New Advisor.*

A picture containing scene, outdoor, water, sky

Description automatically generatedDear Client,

Just a quick note to let you know how much I really enjoyed our meeting last week.

I have been working closely with [name of former advisor] and I look forward to working in partnership with you.

Feel free to contact me anytime.

[Insert personal note based on Client Profile information]

Sincerely,

New Advisor's Signature