Client Letter Template:

**Family Summit Thank You**

**– To the Clients**

*Always include appropriate BD/RIA disclosures and submit template letters for compliance review and approval before using.*

**{Client Name}
{Client Address}
{Client City, State, Zip}**

**{Date}**

Dear **{Client First Name}**,

It was such a pleasure spending time with you and your family last week at your family summit meeting. We’ve talked about (child’s name) and (child’s name) for so many years, it was great getting to know them in person and have some meaningful discussion.

Thank you for all the “work” you have helped us with to make this what you wanted it to be. I hope this meeting has set the stage to carry forward your financial plans to fulfillment.

We will be sending all the follow-up and notes from the meeting soon, including the instructions for the family vault, and follow up items we discussed.

Meanwhile, I congratulate you on a wonderful event that you created for your family. Your efforts, no doubt, have created a lasting impact for the future.

Sincerely,

(Advisor Name)

*Instructional Note: As with the Thank You to the kids, an abbreviated personal message, handwritten on your firm’s branded quality stationery card (or similar, quality formal stationery) is also appropriate for clients. Send the version of a thank you communication that feels most authentic given your historical relationship with them. Make the Thank You mostly personal, saving details of next steps and any other business for a separate communication.*