Client Letter Template:

**Family Summit Thank You**

**– To the Kids**

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

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

**{Date}**

Dear **{Child First Name}**,

Thank you for sharing your afternoon with us last week at your family’s Summit Meeting. Your parents have talked about you so much over the years. It’s a pleasure to finally have had the opportunity to spend time with your wonderful family together.

It means a lot to your parents, and a lot to us that you took the time to meet and have dialogue about their planning and the future. I hope you enjoyed the afternoon.

Please know that as your parent’s financial planner we’re here for your family. That means if you have any questions or would like to talk about anything related to your own plans arising from your Family Summit, we’re happy to have a conversation any time.

As we discussed, we’ll be in touch by email with instructions for the family vault and any subsequent check-in calls your parent’s might request for the family. Thanks again for coming, and please be in touch any time.

Sincerely,

(Advisor Name)

*Instructional Note: As with the Thank You to the clients, an abbreviated personal message, handwritten on your firm’s branded quality stationery card (or similar, quality formal stationery) is also appropriate for their kids. Make the Thank You mostly personal, saving details of next steps and any other business for a separate communication.*