**Client Letter Template |
Advisor Team Structure Announcement**

*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},**

I am writing to share some exciting news with you. At **{Company Name}** we are constantly striving to “raise the bar” on our ability to deliver extraordinary service to our clients. As such, I am very pleased to announce that we have recently implemented a team structure for advice delivery!

Implementing this new team structure is designed to improve every experience you have with us –each advisor will be able to focus on their strengths and you will now have a *team* of advisors working to help you achieve your financial goals. So without further delay, let me introduce you to *your new team!*

Going forward, I will be primarily focused on **{Duties of Existing Advisor Sending Letter}**. Shifting to a team structure allows me to spend more time on supporting your financial and wealth management needs in these areas.

 **{Advisor Name}** is your **{Title}**. On your team, they are primarily responsible for **{Duties}. {Insert one or two sentences about advisor background and credentials.}**

Finally, **{Advisor Name}** is your **{Title}**. They will be your primary point of contact for **{Responsibilities}. {Insert one or two sentences about background and credentials.}**

Over the next several months, I will be bringing the team up to speed on your situation so that they are prepared to serve you at the highest level, and one or more of them will be joining us for your next review meeting.

I look forward to personally introducing you to each of your new team members over the coming months. Should you have any questions or concerns, please don’t hesitate to reach out.

Best regards,

**{Advisor Name}**

**{Advisor Title}**