**Client Letter Template |   
New Client Welcome**

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

**{Client Email Address}**

**{Subject line: “Welcome to the {Firm Name} Family!”}**

Dear **{Client First Name},**  
Congratulations on taking an important step in achieving your financial goals and personal vision!

I wanted to personally thank you for the trust and confidence you’ve placed in our firm. I assure you that the personal attention you received up to this point will only be exceeded by the level of service you will receive as a client.

{Insert a paragraph about what happens next for the client. Example: “Now that we have created your financial plan and begun to transfer your accounts, our operations team will be monitoring the account opening and transfer process to ensure things transfer in a timely manner. At our next meeting, we’ll review the progress of implementing your plan and do a walk through of your new online client portal.”}

{Insert a paragraph about your firm’s mission. Example: “At XYZ Firm, our mission is to help families leverage their wealth to live fulfilling, purposeful lives; it’s why our entire team loves coming to work each day. Everything we do is aligned to support that mission: our Live Well planning process, our annual Live Well strategy sessions with each client, and events like our recent client workshop on charitable giving. We sincerely appreciate the opportunity to help us further live out our mission by becoming a client.”}

We’ll be in touch on a regular basis over the next few weeks, but if there is anything you need before our next meeting, please don’t hesitate to call or email us.

We look forward to a long and mutually-rewarding relationship!

Best regards,

**{Advisor Name}**

**{Advisor Title}**