**Client Letter Template |
New Wealth Advisor Introduction**

*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. As you know, **{Company Name}**’s mission is to **{Company Mission}.**  We’ve been fortunate to be able to fulfill our mission thanks to wonderful clients like you, and have experienced incredible growth over the last few years. So that we can continue to expand the number of people we serve while continuing to provide you with extraordinary service, we’ve recently added a new member to our team!

We’re excited to announce that **{Advisor Name}** has joined our firm as a Wealth Advisor. **{Insert one or two sentences about advisor background and credentials.}** We’re confident once you meet **{Advisor’s First Name}**, you will be as impressed as we are with **{his/her/their}** professionalism, knowledge, and passion for serving clients.

With **{Advisor’s First Name}**’s help, we will be better able to keep a hands-on approach to your wealth management needs, quickly accommodate you when questions arise about your account, and facilitate the timely scheduling of your annual reviews.

Beginning shortly, **{Advisor’s First Name}** will be added as an advisor on your account. I truly value you as a client, and I will continue to be involved in all aspects of your financial plan and investment accounts. I will be meeting with **{Advisor’s First Name}** regularly to provide specific counsel to your individual situation. Be confident we are both committed to ensuring you continue to receive the exceptional service we strive to provide.

We are excited by the growth of **{Company Name}**, and we thank you for your continued trust in us. Please expect a call or email in the near future to schedule a convenient time for you to meet **{Advisor’s First Name}** personally and see why we are so pleased **{he/she/they}** have joined our team. We look forward to talking with you soon!

Best regards,

**{Advisor Name}**

**{Advisor Title}**