**Client Letter Template |**   
**New Wealth Advisor Introduction {Paraplanner Promotion}**

*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. As we continue to expand the number of people we serve and provide you with extraordinary service, we have two exciting announcements to share!

First, we’re excited to announce that after years of study and apprenticeship, plus passing a rigorous exam, **{Advisor Name}** has achieved **{his/her/their}** CFP® credentials and has been promoted to a Wealth Advisor. We’re thrilled that **{Advisor’s First Name}** has reached this professional milestone.

**{Advisor Name}** has been a part of our team for **{# years}.** They have been working with me to deliver great value to you; in many situations they have been assisting with or directly keeping your financial plans up to date. **{He/She/They}** know**{s}** you well, and many of you comment on how much you appreciate them. **{Advisor Name}** will continue to work with me on supporting all of you; in addition, **{he/she/they}** will be directly responsible for more directly working with some of our clients. This has been a process that we committed to many **{months/years}** ago. **{Advisor Name}** and I are both excited about this day -- a day where we can offer even more capacity to you, our clients, and for **{Advisor Name}** to be able to work more directly with you.

With **{Advisor’s First Name}**’s promotion to Wealth Advisor, we **{have hired/will be hiring}** another team member to backfill their position. **{If you have already hired, insert:** I am also very pleased to announce the recent addition of **{New Employee Name}** as **{New Employee Title}**. **{New Employee First Name}** will be responsible for **{Primary Job Functions of New Employee}**.**}**

We are excited by the growth and development of **{Company Name}**’s team members, and we thank you for your continued trust in us. We look forward to talking with you soon!

Best regards,

**{Advisor Name}**

**{Advisor Title}**