

NEW CLIENT WELCOME PROCESS

Welcome Card

Send the Welcome Card the day of or after implementation with a new client. The target date is week one of becoming a client.

Handwrite the note.

Refer to the sample below:

Dear [Client],

Just a quick note to say welcome aboard!

We thank you for your trust and confidence, and look forward to having a great relationship with you. [Insert personal note based on FORM].

Feel free to call any time.

Sincerely,

[Advisor's Signature]

