

NEW CLIENT WELCOME PROCESS

Welcome Gift & Note

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],

We trust all is well with you and we hope you enjoy the [Gift].

Feel free to call if we can be of service.

Enjoy!

Sincerely,

[Advisor's Name]

[Advisor's Title]

