**Welcome Email**

**Client Onboarding STEP 9**

Use the following email script to create and Outlook Template you can use to send to all of your new clients – this creates efficiency and consistency.

Dear [Existing Client],

Thank you for the time you recently took meet with me.

I take great pride in the work I do with my clients and I appreciate that you trust me to take care of your financial affairs. I don’t take that kind of trust lightly and I look forward to continuing our relationship for many years to come.

Please contact me directly if you have any questions about your wealth management or any other aspects of the service and advice we provide you.

I look forward to helping you achieve your goals and objectives.

Sincerely,

Your Standard MIFS Email Signature