## STRATEGY 3: WORK WITH THE RIGHT AFFLUENT CLIENTS

## Client Release Letter Template

Dear client’s first name,

I wanted to follow up on the conversation we had today about our new strategic alliance with name of outside firm and the advantages of moving your account to the new firm.

As we discussed, the primary reason for this move is for you to continue to receive the high-quality service that you so deserve. Name of outside firm is ideally positioned to provide exactly this service, and I wholeheartedly believe that you will be quite happy there.

The next step we need to take is to have your written consent to move your account to name of outside firm. I have included with this letter the appropriate paperwork for your signature, as well as a postage-paid envelope. I encourage you to sign and return the paperwork at your earliest convenience in order to avoid any interruption in the management of your account.

I understand that you may have questions about this, and I encourage you to call me at any time so that I may answer them.

Sincerely,

Financial advisor’s name