

Sample Letter Introducing Supernova to Clients

Dear (put your client's name here),

I am (we are) excited to announce a new level of client service that will impact you starting on (date). We have adopted a new client service model of world-class client service, multi-generational planning, and rapid response to your concerns.

Each client can expect to receive an updated financial plan, implementation of that plan, a cash flow analysis and other materials to facilitate your financial health going forward. Our multigenerational planning will address retirement, education, and tax related issues.

We will have a regularly scheduled, monthly meeting that includes a quarterly phone review every 3 months with 2 of those reviews being in person reviews. The other 8 months we will touch base with you by phone to answer any questions you may have and check in on various other topics of interest to you.

I am going to give you a folder to use on our calls with information about us, your plan, your critical contacts, the agenda for the month (we will email you an agenda before each call) and a place for you to keep notes of anything you would like to discuss with our team at the next regularly scheduled meeting.

My assistant (name) will be contacting you to set up your monthly meeting with me.

If you have an immediate concern between monthly meetings please call us or let us know through email. We are committed to giving you a 1-hour response and 24-hour resolution for your issues.

Thank you for your business,

Sincerely,