

Sample Letter Introducing Supernova to prospects

Dear *(put your prospect's name here)*,

Thank you for allowing me to show you the exceptional client service we give our clients. As I mentioned in our meeting, our new client service model is based on world-class client service (monthly contact), multi-generational planning and rapid response to your concerns. Rapid response means we will respond to any of your emergencies within 1 hour and have a resolution for you in 24 hours or tell you when we will have one.

We have limited our practice to only 100 clients so we can provide this level of service to you.

Each of our clients receives an updated financial plan, cash flow analysis and other materials to facilitate their financial health going forward. Our multi generational planning addresses retirement, education and tax related issues.

We would like to schedule you for the monthly meetings that we give have with all of our clients so that you can experience first hand our level of service. These scheduled monthly meetings consist of: 2 in-person reviews (1 every 6 months), 2 telephone quarterly reviews of 30 minutes and 8 short touches with an educational component. On the calls we will discuss various topics of interest to you including information about taxes, social security, wills & trusts, and planned giving.

(This is Optional to add to your letter) We can also do an analysis of your current situation and see where you need balancing if you are interested.

Please email or call me anytime if I can be of service to you.

(signature and name)