[Your Name/Company Name]
[Your Address]
[City, State, Zip Code]
[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

Thank you for choosing [Company Name] for your [Service Type] needs. It was a pleasure speaking with you during our initial intake session on [Date].

The purpose of this letter is to formally welcome you and summarize the next steps discussed during our meeting. Based on our conversation, we have identified the following initial goals:

- [Goal/Action Item 1]
- [Goal/Action Item 2]
- [Goal/Action Item 3]

To move forward, please provide the following outstanding information or documents by [Deadline Date]:

- [Required Document 1]
- [Required Document 2]

Our next scheduled appointment is on **[Date]** at **[Time]**. This meeting will take place via [Location/Platform].

Attached to this letter, you will find [mention any brochures, contracts, or privacy policies]. Please review these at your earliest convenience.

If you have any questions before our next session, please feel free to contact me at [Phone Number] or [Email Address]. We look forward to working with you.

Sincerely,

[Your Signature]
[Your Printed Name]
[Your Title]