

[Date]

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

Dear [Client Name],

It is a privilege to officially welcome you as a client of [Firm Name]. We appreciate the trust you have placed in us to assist with your financial security and legacy planning.

Enclosed, please find your original policy documents for [Policy Type/Number]. We recommend reviewing these documents carefully and storing them in a secure location. For your convenience, a summary of your coverage and key contact information is also included.

As part of our commitment to providing a bespoke service experience, you will have direct access to our senior advisory team. We will coordinate closely with your legal and tax professionals to ensure this policy remains integrated with your overall wealth management strategy.

We will contact you shortly to schedule a brief follow-up call to address any immediate questions. In the meantime, please do not hesitate to reach out to me directly at [Phone Number] or [Email Address].

Thank you for choosing [Firm Name]. We look forward to a long and successful relationship.

Sincerely,

[Signature]

[Advisor Name]  
[Title]  
[Firm Name]