**New Client Welcome Card (and Gift)**

**Client Onboarding STEP 20**

Use the following as a sample script to welcome your new clients as well as, express your gratitude for their trust and confidence in you.

Instructions:

* Send the New Client Welcome Card immediately following the Policy Delivery.
* Use a quality card.
* Ensure you handwrite your New Client Welcome Card scripting and their address envelope.
* Use a stamp and do not use the postage meter.

NOTE: If this individual qualifies as one of your top (ideal) clients, we recommend you include a welcome gift along with the card.

*Dear [New Client],*

*I wanted to let you know how much I have enjoyed our meetings.*

*I look forward to developing our long-term relationship and I appreciate your trust and confidence.*

*Feel free to call anytime.*

*Sincerely,*

*[Signature of Investment Advisor]*