**Welcome Email Script**

**Client Onboarding STEP 13**

Use the following as a sample email script to welcome all new clients who are not “A” level clients as well as, express your gratitude for their trust and confidence in you.

Instructions:

* Set up a standard Outlook Template to create consistency and efficiency.
* You may wish to include a PDF or link to “How to Read Your Statements” if one is available by the organization.

Dear [New Client],

I want to let you know how much I enjoyed our meeting(s).

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

If you have any questions, feel free to contact me.

Sincerely,

Your Standard Professional Email Signature