Sample Email Message from Client to Advisors

Dear [advisor first name],

We recently engaged [your full name] to help us update our financial and wealth transfer goals, and to refine our strategies accordingly. [Your name] encouraged me to authorize you to work together, and I think that is a good idea. With this in mind, [your name] will call you soon to find a time for the two of you to meet. Please freely share any of my information with [your name]. I understand you will bill me for this meeting. I look

forward to seeing what your collaboration will produce.

Sincerely,

[Client name]