**New Client Welcome Email – Sample Template**

**From:** [Preferably an Operations Manager or Client Experience Manager]

**Subject Line:** Welcome to [Company Name]!

**Email Body:**

Hello [firstname], and on behalf of the entire [Company Name] family, welcome.

Your future is the center of our attention, and we’ll be bringing our best ideas and solutions to help you meet the goals you share with us.

[Advisor Name]is your primary advisor and we take a team approach to our work with you. That means you’ll also be interacting with a few other people, so here’s a quick list of who to contact to get answers the quickest:

Goals, Planning and Strategy [Advisor name, email, phone]

Administrative questions and paperwork [Ops Manager name, email, phone]

Investment related questions [Portfolio Analyst name, email, phone]

You’re going to hear from us in the next few days as we get everything set up for you, and you can always reach us directly at [Phone Number] or any of the email addresses above.

Again, we are excited you’re with us and look forward to serving you.

Warm Regards,  
[Operations Manager’s Name/Client Experience Manager’s Name]