

Dear [first name],

Thank you for putting your trust in my financial guidance over the years. I truly value your business.

Many clients have inquired about my retirement and the future of their financial management. To that end, I'm reaching out to share my succession plan, which will provide you with added value and ensure that your interests are covered.

I have worked diligently to define an approach and align with a firm that embraces my values—one that will treat you with the same respect, diligence, and compassion that I have strived to provide. I have been seeking a true partner that cares for their team and clients like family and will do the same for you, me, and our families.

I am pleased to say that I have finally found that partner in EmVision Capital Advisors. EmVision is a comprehensive wealth management practice focused on EmPowering clients to plan for their desired future. My intent is to increase value for you by enabling you to tap into their team's experience and leverage collaboration between tenured financial advisors. You can rest assured that your financial future is in expert hands.

I look forward to introducing you to the new team who will continue to provide you with the extraordinary service and support to which you're accustomed. EmVision will continue to build the relationship with you long after I have retired, taking care of your family for generations to come. In the meantime, you can learn more about the seasoned team at EmVision Capital Advisors on their website: <https://emvisioncapital.com/>.

As always, feel free to reach out with any questions or concerns.

In your service,