

EXAMPLE ANNOUNCEMENT LETTER

Dear [name],

As your financial professional, over the many years we have worked together, I have truly enjoyed helping you plan and prepare for your future. As you have prepared for your future, I too have been preparing for my future and retirement. So, while this will not be an issue for many years to come, I do think that it is important that we discuss it early so we can make sure you and your family feel secure for the long term.

With that said, I have gone through a very thoughtful process in determining who might bring complementary skills to the group. We will be adding a new team member, Maria Sanchez. Maria's experience and specialization have really stood out to me. She has served several clients whose financial goals are similar to yours and has a track record of success. We believe that Maria will not only be a great fit for our team, but she will bring a complementary skill set such as generational planning, Social Security and tax-smart strategies.

With Maria working alongside me, we'll not only be able to continue the services that we have always offered, but expand our services to help you accomplish your financial goals. Maria respects what we've tried to build together. We share the same beliefs on investing and financial planning, and I feel confident that we will continue the mutually beneficial relationship that we have had over the years. It's important to me that you meet Maria at our next planned meeting. I'll be reaching out to see if you would be interested in scheduling an introductory meeting.

Best wishes,

[name]