

NEW TEAM MEMBER ANNOUNCEMENT LETTER

Dear [name],

As you know, Jim has retired after a long and rewarding career. We wish him well in the next chapter of his life. Since joining the firm several years ago, I have grown to respect the work that he has done with clients like you. Our priority has always been to help you achieve your financial goals. I see my job as all about you and I want to learn more about your portfolio, your goals, and your concerns.

I'm here to listen and hear more from you, especially about elements of your relationship with Jim that have been positive that you'd like to see me continue. I really admire the relationships Jim has with clients like you, and I want to make sure I'm honoring them.

I know you have a choice in who you work with, and I want to earn your trust to make that choice easy for you. Jim and I have worked hard to ensure a seamless transition:

- Our approach to your investments will not change
- We will continue to provide the same level of service you have grown accustomed to.
- There are no plans to increase our costs

We will be calling shortly to schedule a meeting.

Best wishes,

[name]