

Sample Client Review Follow-Up Letter

Direct Mail Piece for KSI Representative:

Should be used on approved letterhead only.

Approval: Submit this piece on the letterhead on which it will be sent.

(insert date)

(insert client's name and address)

Dear (insert Client's First Name):

I would like to take this opportunity to say how much I enjoyed meeting to review your investment and financial goals. You can see that the programs and plans we have put in place are doing well and we are beginning to see the rewards of your discipline and planning.

As we discussed, I have added the following "Steps to Be Taken" to your file, so that we will continue our discussion next time at this point.

Summary of Review: _____

Current Action Items: _____

Future Planning Opportunities: _____

It certainly goes without saying that I appreciate the confidence you have placed in me. I hope our services at this time, as well as in the future, will continue to warrant your faith, confidence and goodwill. With this in mind, please do not hesitate to call me with any questions or problems that might arise. I will always consider it a privilege to be of service to you and your family.

Sincerely,

(insert your name)