**All States**

**Rep Letter to Client (on rep letterhead w/full disclosure)**

**Enclosures: Envelope & Client Review Checklist**

**Client Review Letter – New Rep Taking over Account**

September 23, 2020

«First\_Name» «Last\_Name»

«Mailing\_Street»

«Mailing\_City» «Mailing\_StateProvince» «Mailing\_ZipPostal\_Code»

Dear «First\_Name»:

Thank you for the faith and confidence that you have placed in the «Financial\_Services\_Private\_Label» Program by permitting us to be of service to you.

My name is «Contact\_Owner», and I'd like to introduce myself as the new «Financial\_Services\_Private\_Label» Representative located at «Organization\_Name». I have replaced [Previous Rep Name], the previous «Financial\_Services\_Private\_Label» Representative, and will now be providing all the services to those members who formerly worked with «him/her».

To remain up to date with your financial goals and expectations, I recommend a periodic [quarterly/semi-annual/annual] review meeting. This will give us a chance to meet one another, understand any changes that have occurred for you, review investment decisions you have done through our program already and make sure you’re on track to achieve your objectives.

Please contact our office at «Contact\_Owner\_Phone» to set up a time that is convenient for you. Also, please complete the enclosed Client Review Checklist and mail or fax it to me ***prior*** to our meeting**.** This will help me prepare for our meeting and make our time together as valuable as possible.Our fax number is [representative fax number] or you may use the enclosed envelope.

Periodic client reviews are an extremely important element in making sure you are on track to meet your financial goals. Please set aside one hour for this review.

As always, I thank you for the confidence you place in us and I hope to work with you toward your financial success for many years to come. I look forward to seeing you soon.

Sincerely,

«Contact\_Owner»

«Contact\_Owner\_Representative\_Title»

Enclosures

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