

Dear [Client Name],

## Welcome to Elite Portfolio Services

It is a pleasure to welcome you as a client of Elite Portfolio Services. We are honored that you have chosen us to manage your investment portfolio and assist you in achieving your financial goals.

At Elite Portfolio Services, our mission is to provide sophisticated investment strategies and personalized service. Your dedicated Portfolio Manager will be [Manager Name], who will serve as your primary point of contact for all matters regarding your accounts.

### Your Next Steps:

- **Account Access:** You will receive a separate email containing your login credentials for our secure client portal.
- **Initial Consultation:** Your Portfolio Manager will contact you within [Number] business days to review your current asset allocation.
- **Documentation:** Please ensure all requested identification and onboarding documents have been uploaded to your profile.

We are committed to transparency and excellence in wealth management. If you have any immediate questions, please contact our client service team at [Phone Number] or [Email Address].

Thank you for placing your trust in us. We look forward to a successful and long-term partnership.

Sincerely,

[Authorized Signature]

[Name of Executive]

[Title]

Elite Portfolio Services