

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Dear [Client Name],

Welcome to [Company Name]. It is an honor to partner with you for your exclusive wealth protection and preservation needs.

Our primary goal is to ensure your legacy is secured through proactive strategy and rigorous risk management. As a member of our private wealth tier, you now have access to our full suite of protective services, including asset shielding, tax optimization, and bespoke estate planning.

Your Onboarding Process:

- **Discovery Review:** We have scheduled your initial strategy session for [Date/Time].
- **Documentation:** Please review and sign the attached digital documents via our secure portal.
- **Dedicated Advisor:** Your primary point of contact is [Advisor Name], who can be reached directly at [Phone Number].

We have attached a summary of your personalized protection roadmap for your immediate review. We look forward to a long and successful partnership in safeguarding your financial future.

Sincerely,

[Signature]

[Sender Name]

[Title]

[Company Name]