[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Re: Post-Transition Asset Management Advisory

Dear [Client Name],

Following the recent transition of your assets to [Company Name], we are writing to formally outline the next steps for the ongoing management and oversight of your portfolio.

Now that the initial onboarding phase is complete, our primary focus is to ensure your investment strategy remains aligned with your long-term financial objectives. Moving forward, our advisory services will include:

- **Portfolio Rebalancing:** Periodic adjustments to maintain your target asset allocation.
- **Performance Reporting:** Detailed quarterly reviews of account growth and market benchmarks.
- **Market Analysis:** Strategic updates regarding economic shifts that may impact your holdings.
- **Tax Optimization:** Implementing strategies to enhance after-tax returns where applicable.

We have scheduled a formal review meeting for [Date] at [Time] to discuss your current portfolio positioning and address any questions you may have regarding the new account structures.

Attached to this letter is a summary of your transitioned assets and your updated Investment Policy Statement (IPS) for your records.

We appreciate the trust you have placed in our firm. Should you have any immediate concerns, please contact your advisor directly at [Phone Number].

Sincerely,

[Signature]
[Advisor Name]
[Title]
[Company Name]