

[Date]

[Client Name]
[Address Line 1]
[Address Line 2]

Subject: Switch to Paperless Statements and Earn a \$[Incentive Amount] Cash Bonus

Dear [Client Name],

At [Wealth Management Firm Name], we are committed to providing you with secure, efficient, and environmentally friendly ways to manage your wealth. We are writing to invite you to simplify your account management by enrolling in paperless statements.

As a token of our appreciation for making the switch, we will credit a **\$(Incentive Amount) cash bonus** directly to your [Account Type] account when you opt out of paper mailings by [Deadline Date].

Benefits of Paperless Statements:

- **Enhanced Security:** Reduce the risk of mail fraud and identity theft.
- **Faster Access:** View your monthly statements as soon as they are available.
- **Less Clutter:** Organize your records digitally and reduce paper waste.
- **Historical Access:** Access up to [Number] years of past statements online anytime.

How to Enroll:

1. Log in to your online portal at [Website URL].
2. Navigate to the "Settings" or "Document Preferences" section.
3. Select "Paperless" or "Electronic Delivery" for your statements and tax documents.
4. Click "Save."

The cash incentive will be deposited into your account within [Number] business days following your successful enrollment.

If you have any questions or need assistance with the enrollment process, please contact your Wealth Advisor or our client service team at [Phone Number].

Thank you for your continued trust and partnership.

Sincerely,

[Sender Name]
[Title]
[Wealth Management Firm Name]