

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Subject: Invitation to [New Tier Name] Membership

Dear [Client Name],

It is our pleasure to recognize your continued partnership with [Company Name]. Due to your recent account activity and loyalty, we are delighted to formally invite you to join our **[New Tier Name]** private client program.

As a [New Tier Name] member, you will receive access to an enhanced suite of bespoke services, including:

- [Benefit 1: e.g., Dedicated Relationship Manager]
- [Benefit 2: e.g., Priority Transaction Processing]
- [Benefit 3: e.g., Exclusive Market Insights and Reports]
- [Benefit 4: e.g., Invitations to Private Events]

This advancement is a reflection of our commitment to providing you with the highest level of personalized attention and financial expertise.

To finalize your transition to this new tier, please contact your current advisor, [Advisor Name], at [Phone Number] or simply reply to this email. We would be happy to walk you through the updated features of your membership.

Thank you for choosing [Company Name]. We look forward to supporting your continued success.

Sincerely,

[Sender Name]

[Title]

[Company Name]