[Date]

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

Dear [Client Name],

Welcome to [Company Name]. We are pleased to confirm your enrollment in our Bespoke Portfolio Management service.

Our primary objective is to manage your wealth with a strategy tailored specifically to your unique financial goals, risk tolerance, and long-term aspirations. As a bespoke client, your portfolio will be actively monitored and adjusted to align with your personal requirements and the evolving market landscape.

Your Dedicated Team
Your primary point of contact will be [Portfolio Manager Name]. You can reach them directly at [Phone Number] or [Email Address] for any questions regarding your investments or changes in your financial situation.

What to Expect Next
1. **Initial Allocation:** Within [Number] business days, we will begin the transition of your assets into your customized investment strategy.
2. **Online Access:** You will receive a separate email with instructions on how to access your secure client portal to view real-time performance and holdings.
3. **Reporting:** You will receive comprehensive performance reports on a [Monthly/Quarterly] basis.

We appreciate the trust you have placed in us. We look forward to a successful, long-term partnership in managing your wealth.

Sincerely,

[Signature]

[Name of Principal/Manager]
[Title]
[Company Name]