[Date]

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

Dear [Client Name],

Welcome to [Company Name]'s Private Wealth Management. We are honored that you have chosen us to manage your financial legacy and help you navigate your long-term goals.

As a VIP client, you now have access to our exclusive suite of services, including bespoke investment strategies, tax optimization planning, and dedicated estate coordination. Our primary objective is to provide the personalized attention and sophisticated solutions that your portfolio requires.

Your dedicated Private Wealth Advisor is **[Advisor Name]**. You can reach them directly at:

- **Phone:** [Direct Phone Number]
- **Email:** [Email Address]

We have scheduled an initial onboarding meeting for you on [Date] at [Time] to review your current asset allocation and discuss any immediate financial priorities. If this time is not convenient, please let us know.

Thank you for placing your trust in [Company Name]. We look forward to a successful and lasting partnership.

Sincerely,

[Principal Name]
[Title]
[Company Name]