

[Date]

[Client Name]

[Client Company Name]

[Client Address]

Dear [Client Contact Name],

Welcome to [Your Firm Name]. We are pleased to formally begin our partnership as your Outsourced Chief Financial Officer (CFO) service provider.

Our primary goal is to provide the strategic financial oversight and insights necessary to help [Client Company Name] achieve its long-term objectives. As your CFO partner, we will focus on enhancing your financial clarity, optimizing cash flow, and supporting your executive decision-making processes.

To ensure a smooth transition, we have outlined the initial steps of our onboarding process:

- **Discovery Meeting:** Scheduled for [Date/Time] to review your current financial systems and goals.
- **Data Integration:** Our team will coordinate with your bookkeeper/accountant to gain secure access to your financial records.
- **Reporting Cycle:** We will establish a recurring schedule for financial reviews and strategy sessions.

Your primary point of contact will be [Lead CFO Name], who can be reached directly at [Email Address] or [Phone Number].

We are committed to the success of your business and look forward to a productive collaboration.

Sincerely,

[Your Name]

[Your Title]

[Your Firm Name]