

Sample Template: User to Client

Dear [Client's Name],

We take pride in the depth of our relationships with clients. From our newest clients to those who have been with us for years, we strive to be active participants in your financial lives. And it's for this reason we're excited to introduce our new technology platform.

This platform is simple. It brings together your entire financial picture into one private and secure portal that makes organizing and planning your financial life easier than ever before. For you, this means a personal financial website to securely house all of your information. For our team, this means highly accurate financial plans that update in real time. And for all of us, it means a more collaborative wealth management experience.

Your first step is to register for your personal financial website, followed by answering a series of questions to help customize your experience. Please reference this [Getting Started Guide](#) as you get set up.

[eMoney note: Access the URL for this guide by going to **Help > Client-Facing section > A Guide to Getting Started (Client-Facing User Guide)**].

It's important to note that the security of your financial information is our highest priority. Our platform uses 256-bit encryption on industry-leading secure servers, along with several other advanced security features. To learn more, [view and download our security overview](#).

[eMoney note: Access the URL for this guide by going to **Help > Client-Facing section > Safe and Secure (Client-Facing User Guide)**].

We hope you're as excited as we are! We'll be back in touch shortly with next steps.

Sincerely,

[Financial Professional's Name]