Investment Advisor Team Transition Roadmap

Date: [Insert Date]

To: [Client's Name]

From: [Your Name] | [Your Position]

Dear [Client's Name],

As part of our commitment to providing you with the best possible service, we are writing to inform you about the upcoming transition within our investment advisor team. Below is a roadmap that outlines the key steps we will be taking to ensure a seamless transition.

Transition Roadmap

1. **Initial Planning (Week 1-2):** Review client portfolios and assess current strategies.
2. **Advisor Assignments (Week 3):** Assign appropriate advisors to clients based on expertise.
3. **Client Communication (Week 4):** Schedule one-on-one meetings with clients to discuss the transition.
4. **Implementation (Week 5-6):** Begin executing the agreed-upon strategies with new advisors.
5. **Feedback & Adjustments (Week 7):** Gather feedback from clients and make necessary adjustments.

We understand that transitions can be a source of concern, and we want to assure you that we are dedicated to maintaining the high level of service you expect. Our team is here to support you every step of the way.

If you have any questions or would like to discuss this transition further, please do not hesitate to reach out.

Thank you for your continued trust in our team.

Sincerely,

[Your Name]
[Your Title]
[Company Name]
[Contact Information]