

# Financial Documentation Setup

Date: [Insert Date]

[Client's Name]

[Client's Address]

[City, State, Zip Code]

Dear [Client's Name],

We are pleased to welcome you as a new client. To ensure a smooth and efficient financial documentation setup, we kindly request that you provide us with the following information and documents:

- Completed Client Information Form
- Copy of Government-issued ID
- Recent Bank Statements (last 3 months)
- Proof of Income (pay stubs or tax returns)
- Any relevant financial contracts or agreements

Please send the requested documents to us by [insert deadline]. If you have any questions or need assistance, feel free to reach out at [insert contact information].

Thank you for choosing us for your financial needs. We look forward to working with you.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]