

Going Digital

Suggested language to help engage your firm and clients.

Dear [NAME],

I hope that you are well, and finding ways to deal with the uncertain times in which we now live.

For me, this means accelerating my digital operations and processing capabilities. Although much of the world has come to a standstill, your financial needs don't have to. Money can be moved in or out of your account at the click of a button, documents shared in a paper-free manner and forms signed online—all without the need to meet in person.

Continuing to meet your financial needs virtually during this time is of the utmost importance to me. Please let me know how I may help. If you would like to discuss, contact me at [CONTACT INFO].

All my best,

