

Going Digital

Suggested language to help engage your firm and clients.

Dear [NAME],

I hope you are doing well and staying safe. I want you to know that I am here to help.

During this period of disruption, as we are all working differently, there are a number of digital tools you can use to conduct your important investing activities online, without the need to walk into a branch office. 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, without the need to meet in person. If you would like to learn more about the solutions available to you, or have other matters you would like to discuss, please call me at [CONTACT INFO].

All my best,

[INSERT ADVISOR EMAIL SIGNATURE]

