|  |
| --- |
| Company Name |
|  |

[Date]

[Name]

[Street Address]

[City], [State] [Zip Code]

Hello [Mr./Ms. CPA or Attorney Last Name],

Your clients [Mr. and Ms. Client] recently became a client of mine as well. They spoke very highly of you and the work you’ve done for them.

Please let me know if there is any way that I can assist you in your work with [Mr. and Ms. Client]. I believe their transition to me went smoothly and I want to make sure that anything we do, dovetails with the work you’ve already done for them.

If you have any questions or concerns, please feel free to give me a call at <your number> or email me at [your email]. I’ve also enclosed a card. With your permission I will drop you a note occasionally with matters of interest, just to keep the lines of communication open.

Best regards,

[Advisor Name and contact info]