The 7 Must-Have Email Templates for Financial Advisors

Here are the templates we will guide you through:

- **Introducing your new FMG Suite website**
- **Introducing your firm's social media profiles**
- **Welcoming a new email list subscriber**
- **Introducing your new mobile app**
- **Reaching out for a meeting**
- **Introducing a new product, service, or technology**
- **Asking for a referral**

Happy emailing!

Introducing Your New Website

Congratulations! If you're reading this, you likely are the new parent of an FMG Suite website. Below is an example of an email you can send out announcing the launch of your new site. This is a good announcement email to use because it doesn't demand anything of your recipients, but educates them on your new developments. Good emails are never pressuring, but invite a reader to take action if they feel inclined.

Hello [CLIENT NAME],

We are excited to announce the launch of our brand new website, [LINK TO SITE]! We have created our new site to improve the level of service we offer, make it easier to get in touch, and provide you with valuable financial information.

Our site features hundreds of videos, articles, and calculators to educate, entertain, and answer your questions. New content will appear on a regular basis, so take a moment to bookmark our site and come back often. If you see anything there that sparks your interest, or if you have any questions or concerns, send us an email or give us a call. You can also use the easy navigation to log into your client account or send us a message.

Please feel free to share our new website with family and friends. We are never too busy to help someone important to you!

We hope you enjoy the new website. Best Regards,
[YOUR NAME]

Introducing Your Social Media Profiles

Launching new social media profiles is an exciting time and sending out an email to announce these profiles will help you get Likes, Followers, and views on your posts.

The below email can be used to announce your new profiles. Like the website announcement email, this template is good because it doesn't pressure your clients to like your pages. Instead, it introduces your profiles and gives people a reason to follow you. Remember to check with your broker-dealer on approved uses of social media and email.

Dear [CLIENT NAME],

We are writing to invite you to connect with us on social media!

We have launched new Facebook, Twitter, and LinkedIn pages [HYPERLINK YOUR PROFILES] for our practice. Here, we'll offer interesting financial information including videos, articles, and other topics that you may find helpful as you plan for your future.

Please take a moment right now and visit our pages and click "Like" or "Follow." We look forward to bringing you lots of great information and keeping in touch. We hope you comment on our posts and feel free to ask any questions or share our content with friends and family who would benefit from the information.

Best Regards,
[YOUR NAME]

Welcoming a New Subscriber to Your Email List

The more the merrier when it comes to email marketing. When you get a new subscriber, make sure to welcome them to your email list and tell them what to expect. Here is one we suggest:

Hey there, [CLIENT NAME]

Thanks for signing up for our email newsletter! With this, you can expect some great things to come your way, including:

- ***A special birthday greeting with some financial tips to think about for the year***
- ***Updates on our firm's policies, hours, and services***
- ***Holiday greetings throughout the year***
- ***A monthly update on the market performance of the last month, complete with video and text descriptions***
- ***Useful financial content you can easily share with family and friends***

We're so excited to have you in the [FIRM NAME] family and look forward to working together. As always, feel free to reach out at [EMAIL] or [PHONE NUMBER] if you have any questions.

Sincerely,

[YOUR NAME]

Introducing Your New Mobile App

Your mobile app is likely the first that your clients and prospects have seen from a financial advisor, so you may need to brief them on what to expect. Here is an email template to get started:

Hello [CLIENT NAME],

If you've visited our website recently, you may have seen a button prompting you to download our app. But what is our app, anyway?

[FIRM'S NAME]'s app is a cutting-edge way to stay in contact with our clients and prospects in and out of the office. It is available in both the Apple App Store and the Google Play Store and is easy to download on mobile devices. Using our app, we can:

- ***Update you on office closures or changes in hours***
- ***Send push notifications with videos, articles, and personal messages***
- ***Update our contact information regularly***
- ***Schedule an appointment with our clients***
- ***Provide a client login that is easily accessible at all times***

You can download our app here [LINK TO APP]. As always, reach out if you have any questions about our website or app.

Happy downloading,
[YOUR NAME]

Reaching Out For a Meeting

If you're like most independent advisors, you offer your clients semi-annual or annual meetings to check up on their portfolios. Most clients are happy to meet with their advisors, but for some getting that meeting scheduled is like pulling teeth. Between your schedule, their schedules, and the everyday rush, it can be hard to get something on the calendar.

Communication is so important in the financial services industry, and an email like the following will remind your clients that you are thinking about them and care about their education and portfolio performance. Here is an email to get you started:

Hey there, [CLIENT NAME]!

It's been awhile since we last met about your investments. Don't worry, though, they haven't been just sitting collecting dust. My team and I have been diligently monitoring your investments and would love to meet with you to discuss.

When can we schedule your semi-annual/annual review?

I look forward to meeting with you and your family soon!
[YOUR NAME]

Introducing a New Product, Service, or Technology

The financial services industry is always changing and we're sure that you're always implementing new processes, technologies and services at your firm. One way to keep your clients updated on the changes happening is to send out an email.

Remember, when sending emails about advancements is that some clients might be hesitant to changes. Make sure to emphasize that your firm isn't drastically changing anything, but instead offering further benefits that weren't available before. To get you started, here is a template we created:

Hello, [CLIENT NAME]

It's an exciting time of change for our team and family of clients and we are proud of all the developments at our firm. Thanks to the hard work of our team and the continued support of our clients, we are proud to announce the launch of our new [NEW PRODUCT, SERVICE, ETC.]

This new advancement will bring increased benefits to our clients, including a higher level of service and more access to education and guidance with their investments (this sentence might need to change a bit, depending on the offering).

We're so excited to have you on this journey with us as our firm continues to grow, and thank you again for your support.

[YOUR NAME]

Asking For a Referral

Ahh, the omnipotent referral, the gasoline that drives every financial advisor's growth. Referrals are crucial to growing your business, but how do you go about breaching that often tricky subject? We know it can be a little awkward to ask clients for referrals, but this email template can help you break the ice.

Hi, [CLIENT NAME]

One of the highest compliments we can receive from our clients is when they make the effort to recommend my services to their friends and neighbors. The majority of our business is run on referrals and this business model allows us to build trust with our new clients because we already have a relationship with someone they know.

Fortunately, we serve a wide range of clients who are happy to refer us to their friends and families, and we are extremely grateful for this generous outreach. Our clients often tell us that they are happy to recommend our firm for a variety of reasons, including our experience, relationship-based processes, and communication style.

We are never too busy to be a resource to you or someone you care about. If you are one of our loyal clients, we want to thank you for entrusting some of your most valuable assets to our care and hope you'll refer our services to a friend, colleague, or family member. We would love to set up a complimentary first meeting and can be reached directly at [EMAIL] or [PHONE NUMBER].

Thank you in advance,
[YOUR NAME]