Hi [Client Name], it’s [Advisor Name], your SPF\* financial advisor located at [Program Name]. How are you?

I’ve got some great news about enhancements we’ve made to the Client Asset Management (CAM) program available through Sorrento Pacific Financial, LLC. You’re invested in this program, so I wanted to fill you in. Do you have a few minutes to talk?

[If no] No problem. When is better time for me to call you back? Or I have a [Letter/Email] with more details I can send you too.

[If yes] Great! Well we recognize the importance of your investments as part of your overall financial plan, and we’re always striving to improve our capabilities. We’ve made a lot of program changes. I think the biggest thing you’ll like is we’re offering a *reduction* in the fee rate, so your prices will be going down!

[Let them respond] I know, I love calling with good news!

For you, it’s on your CAM [account type] account. It’s account number [account number] and the price will go down from [old price] to [new price].

[Let them respond and ask questions.]

You do not need to do anything as your account will be updated automatically to reflect the price reduction. You will see the result of the reduced fee rate in your next statement.

Our investment in CAM doesn’t stop there. Helping you achieve your financial goals is our highest priority, and we’re committed to continually improving our investment services to you. Your portfolio will still be managed with the attention it has always gotten, and my services will remain the same too. We’re just adding more options and decreasing the fee rate. It’s all great news.

That’s about it! I’ll be sending out a [letter/email] with all this same information, but I thought you’d appreciate a call too. If you think of any questions, just give me a call. Do you have my number? [Give them phone number if they need it]

[Talk about any other business – ex. Looks like our next meeting is XYZ, so I’ll see you then!]

[Follow up on personal life – ex. How are the kids, etc.]

[Reiterate to call you with any questions and say goodbye]