**Communicate with Purpose**

Sample for Engaging Client Communications

Clients are looking to their financial advisor for confidence and guidance. Don’t wait for clients to reach out to you. Even if they’re not calling you, it doesn’t mean they aren’t concerned.

Leverage our sample communication--or use it as talking points--when engaging with clients in person or virtually through video, phone, email, or social media.

As a reminder:

* Begin with your largest, best relationships and have your staff to reach out to smaller clients
* Provide consistent weekly updates to demonstrate your authority and focus on the issues
* Clients may receive their news via social media; meet clients where they are and be sure to post regularly on these channels
* Virtual meetings and video are becoming the norm. Consider leveraging resources such as Zoom, WebEx, Brainshark, YouTube, or BombBomb to keep clients engaged
* Additional client communications are available to AssetMark advisors by logging in to [eWealthManager](https://www.ewealthmanager.com/en/practice-management/Crisis-Resources/Crisis-Resources/Communicate-with-Purpose.aspx)

**Focus on Reassuring Clients**

Dear Client,

The last couple weeks have likely caused a lot of stress and anxiety. Experiencing significant short-term market volatility is certainly not for the faint of heart. But as you know, for the past (insert number of years your firm has been in business) years, we have been working with you and with other families in the community to plan and prepare for the future, recognizing that situations like this will happen.

As your advisor, whose job it is to maintain perspective and objectivity for you, we should keep the big picture in mind. During times like this, we need to remind ourselves that reacting emotionally to daily volatility and headlines could prove costly in the long-term. That being said, we understand the difficultly in remaining calm. I can assure you; we are monitoring your (plan/strategy/investments) and if necessary, will notify you of any suggested changes.

We are committed to you and will continue to provide you essential updates when necessary. If you need more communication from us, or want to talk with us directly, please call (insert phone number/s) or schedule a meeting through our online calendar tool (insert link).

Sincerely,

**IMPORTANT INFORMATION**

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