**Existing Client Email Template**

Dear ,

As you know, at our firm we are constantly trying to improve the solutions and services we provide our clients. As one of my highly respected clients, I wanted you to be the first to hear some exciting news. Our firm has recently expanded our dynamic organization by creating a company solely focused on the group benefits space. This organization, Coastal Wealth Solutions, is dedicated to providing industry leading products and services to our clients who own, operate, and manage businesses. Regardless of the number of employees or the number of locations, we have compiled a team who has the experience to handle your needs.

As a holistic planning firm, our goal has always been to provide relevant solutions for our clients, and with the addition of a goup benefits firm, we can provide top notch solutions for you personally and professionally. I truly think it would be beneficial for us to meet, along with one of my colleagues from our benefits company, to discuss the solutions we can provide you and your business. Please let me know your availability for a quick introductory meeting so we can answer any questions you may have.