

FREE RESOURCE

Client Onboarding Email Templates

Four copy-and-adapt emails: welcome, documents request, first-review invite, and 30-day check-in.

How to use these

Copy, adapt to your voice, save as templates in your CRM or email tool. Brackets mark the fields to personalize.

1. Welcome — sent within 24 hours of signing

Subject: Welcome to [Firm Name], [First Name]

[First Name] — we are glad to have you with us. Here is what happens next:

1. You will receive your account paperwork by [day] — it takes about 10 minutes to complete.
2. Once received, we open your accounts and begin any transfers (typically 7-10 business days).
3. We will then schedule your first review meeting, where we walk through everything together.

Your main contact for paperwork questions is [Name] at [phone/email].

— [Advisor Name]

2. Documents request — sent with the paperwork

Subject: Your [Firm Name] paperwork — 10 minutes

Hi [First Name],

Attached is your new-account paperwork. Three quick things:

- Sign everywhere marked (digital signature is fine).
- A photo of your driver's license — front and back.
- Reply to this email with both, and we handle the rest.

Questions? Call or reply — [Name], [phone].

— [Advisor Name]

3. First review invite — sent once accounts are open

Subject: Let's review everything together, [First Name]

Hi [First Name],

Your accounts are open and transfers are complete. Time for our first proper review — 45 minutes, we will walk through your accounts, confirm everything is as expected, and set the agenda going forward.

[Calendar link or two proposed times]

— [Advisor Name]

4. Thirty-day check-in

Subject: How are we doing so far?

Hi [First Name],

It has been about a month since we started working together. Quick check-in:

- Is anything unclear about your accounts or our process?
- Is there anything you expected that has not happened yet?

Honest answers welcome — that is how we get better.

— [Advisor Name]

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