

Client Advisory Council Invitation Letter

[Date]

[Name]

[Address]

Dear [Client]

*When you have a problem, here are three questions you can ask yourself:
'What can I read? What can I do? Who do I ask?
~ Jim Rohn, Business Philosopher*

We recently spoke about an important process I am undertaking here at my office. In order to continue to improve my level of client service, I invited you to participate, along with a handful of my other preferred clients, in my first ever *Advisory Council*.

Why am I asking you?

To be candid, I would have 100 clients just like you if I could. When I committed to this idea, I sat down at my desk and made a list of those clients I considered to be my favorites. I have only mailed an invitation to you and nine others.

Why am I doing this and what do I hope to accomplish?

I look forward to getting together for a nice dinner (on me, of course). You will have the opportunity to meet and mingle with some good people, and to pass along your observations on being one of my clients.

The Advisory Council will consist of 10 members. We will share ideas, and we will strive to turn ideas into actions. Your open and honest feedback will improve the quality of service you are accustomed to receiving.

The meeting is scheduled for [time], [date] in the [meeting room] at [place], [city]. [My assistant] of our office will be in touch with you verify the details of the dinner and to

confirm your attendance. In the meantime, if you have any questions, please do not hesitate to contact me at my office.

Best regards,

[Advisor's Name]
Financial Advisor