Dear (Client Name)

In my continuing effort to serve your evolving financial needs, I'm pleased to report that I recently earned my Certified International Wealth Manager (CIWM) certification.

The CIWM certification is the leading international wealth management designation, co-granted by the Canadian Securities Institute (CSI) and the Swiss based Association of International Wealth Management (AIWM). The AIWM is a non-profit association, dedicated to enhancing competency standards of the wealth management profession around the world. CSI is the leading financial services education provider in Canada. Together, they offer the CIWM certification in North America. This designation is designed to provide me with the ability to meet demand for a more holistic approach to building, protecting and finally transferring wealth based on your wishes and your needs.

In addition to my existing education and experience, this designation signifies a level of wealth management specialization that speaks to the enhanced depth of advice I can offer to better meet your needs.

I am obligated (and personally committed) to meet continuing education requirements annually and adhere to a strict ethics code. I will share the details with you as you deem appropriate.

If you have any questions about this designation or wish to review the learning framework, I'd be delighted to share it with you. Thank you for your continued support and interest.

Sincerely,

<NAME>

<FCSI, CIWM, ETC.>

OPTIONAL:P.S. If you have time, review the enclosed brochure about this exciting and exclusive designation or pass it along to your friends and family. I'd be pleased to answer any questions that arise.