

## Client Transition Email/Introduction of New Consultant

Hello, (COMPANY NAME) team. I hope this finds you well!

I'm writing to let you know that I (will be retiring/have accepted a new role/other reason) and that this will take me away from my day-to-day account management responsibilities with (Captive Name/Member Name). Therefore, I will no longer be servicing accounts on a regular basis or acting as your dedicated, assigned risk control consultant moving forward.

I have enjoyed working with you and take pride in the work we have been able accomplish together to date.

However, I transition away knowing that you are in very capable hands – in fact, I could not ask for a better consultant to take over your account. Allow me to introduce (NEW CONSULTANT NAME). I have worked with (NEW CONSULTANT FIRST NAME) for some time now, and (s/he) is not only knowledgeable and dependable but also the consummate professional. (His/her) bio is attached for your consideration.

It has been an honor to serve (COMPANY NAME). Should you have any questions regarding this transition, please do not hesitate to contact me.

Sincerely,

(CONSULTANT NAME)

(CONSULTANT PHONE)

(CONSULTANT EMAIL)