

Creating a Professional Client Newsletter

Your Quick-Start Guide



The benefits of a client newsletter

Creating a professional client newsletter isn't just about sharing updates, it's about supporting your clients at every stage of their journey. Under the FCA's Consumer Duty, the fourth outcome (Consumer Support) requires firms to deliver ongoing, effective and accessible support to customers. This guide will help you communicate throughout their lifecycle in a way that ensures clients receive the help and information they need to make informed decisions and get the most from your services.

Why a newsletter works

A regular newsletter keeps you visible, builds trust, and reminds clients of the support you offer. Once clients have taken out a lifetime mortgage, keeping in touch helps nurture your ongoing relationships and reinforces your role as a reliable, knowledgeable professional, encouraging clients to return to you when their needs change.

Simple topics to cover

You only need a few recurring themes to keep a newsletter effective:

- **Client check ins:** Gentle prompts such as "Is it time for a financial review?" or "Have your goals changed recently?" encourage clients to reflect on their situation and recognise when they may benefit from advice.
- **Short explanations:** of further borrowing options, interest rate updates, or how drawdown plans work which helps keep clients informed and aware of the flexibility available to them.
- **Topics:** like downsizing or home renovations can spark natural conversations about changing needs and how equity release might play a role.
- **Company news:** Share new services, milestones or awards to reinforce credibility and show clients that your business is active and growing.
- **Promote other services that you offer:** Power of Attorney's or referral to will writing partners.
- **Care support services:** whether you offer advice yourself, or you have partnered with a firm like My Care Consultant.



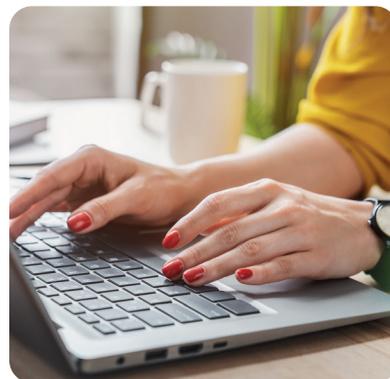
Make it look professional

Strong visuals help clients stay engaged. You don't always need a design budget, free image libraries such as **Centre for Ageing Better**, **Freepik** and **Unsplash** offer high quality, professional photos you can use at no cost. Clean, relevant imagery helps your newsletter feel polished and trustworthy.

Extra touches that add value

Adding small, thoughtful elements can make each newsletter feel more personal and engaging.

- Testimonials from real clients help demonstrate the positive outcomes you've delivered and reassure readers that others have had a good experience working with you. Just be sure to obtain their permission before sharing!
- A quick myth buster to clear up common misconceptions.
- A simple call to action such as "Book your annual review" or "Get in touch to discuss your options".



Suggested layout options

To help you visualise how these principles come together in practice, the example layout below offers a starting point for crafting your own engaging client newsletter.

Email Layout 1

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Email Layout 2

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