NEWS
For Immediate Release

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Libretto Launches One-Click Personalized Client Letters for Financial Advisors

New feature helps advisors scale a more personalized client experience, delivered more efficiently

LOS ANGELES, CA (February 25, 2025) – Libretto, the innovative advice platform empowering financial advisors and family offices with total wealth financial planning and investment software, today announced a new feature enabling advisors to generate personalized, graphic-rich, white-label client letters with the click of a button.

"Libretto scales sophisticated planning, asset allocation, and risk management advice – our users connect the dots for their clients across these areas," said **Trevor Coyle**, Product Manager at Libretto. "With these client letters, we're helping advisors create a narrative-driven client deliverable that not only illuminates the comprehensive client solution but also enables deep dives into specific areas, tailored to what the advisor and client want to focus on."

The client letter is designed to help advisors deliver personalized advice at scale. From within any client's strategy, advisors can open the client letter builder, select a template, and create a custom table of contents with topics addressing the client's specific needs. From there, Libretto takes care of writing the narrative and inserting client-friendly charts and graphics so that the client receives a bespoke whitepaper addressing their unique situation. Beneath the hood, the letters combine the consistency and accuracy of Libretto's proprietary knowledge engine with additional personalization enabled by generative AI. The resulting letters help clients understand and visualize their financial situations, and advisors can use these materials to embed personalized narratives into post-meeting follow-ups, quarterly reports, and annual reviews.

The client letter is launching with 20+ topics and 10+ templates addressing important client questions such as:

- Do you have enough to cover your life objectives?

- Are you prepared for a market crash or recession?
- How does your career impact your strategy?
- Is your portfolio on target?

"We designed the client letter to be highly customizable, so we're excited to see how our users leverage the letters," said Coyle. "One standout use case that emerged during our beta testing was to use the letter as a proposal deliverable. In combination with our other prospect tools, you can go from a blank plan to a full-blown strategy deliverable over the course of an initial info-gathering meeting."

With the client letter, advisors can seamlessly integrate personalized narratives into their client-facing materials:

- **Prospect proposals** that identify areas for strategy improvements and connect advisors' value propositions to specific aspects of the prospect's financial situation.
- **Annual deliverables** with client-friendly graphics and detailed strategy narratives that reinforce advisor value-add.
- **Post-meeting briefs** that keep clients engaged with concise strategy recaps.
- **Onboarding deliverables** that introduce new clients to their comprehensive financial strategy process.
- **Topical pieces** connecting concepts such as liquidity, inflation protection, and risk management to each client's unique situation.

To learn more about Libretto, the new client letter, and other features of the platform, please visit the Libretto website.

ABOUT LIBRETTO

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