

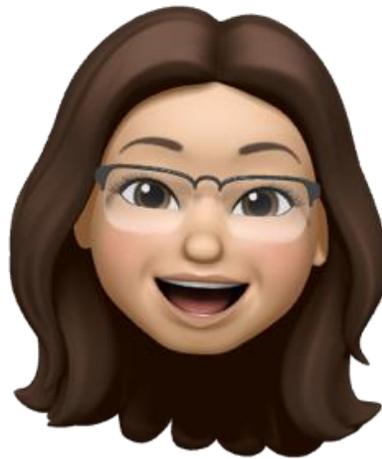


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## Ellen's Positive Note #4



This is the fourth in a weekly series with Investment Executive to help advisors and dealers in the financial industry through this pandemic of COVID-19.

The goal of *Ellen's Positive Notes* is to lighten the mood during these difficult times and to provide you with tools to help you. If you have colleagues who do not subscribe to my e-alerts please pass this along and ask them to email me so we can add them to our list:

([ebessner@babinbessnerspry.com](mailto:ebessner@babinbessnerspry.com)) or Kim  
([kmcpeake@babinbessnerspry.com](mailto:kmcpeake@babinbessnerspry.com)).

I invite any feedback or questions or comments or other ideas you have for this new weekly column. Here it is... and **stay safe – please!**

# How to write meaningful emails to clients

Well-written emails can help you build trust — and they might even put a smile on a client's face

By Ellen Bessner, BABIN BESSNER SPRY LLP

(Published by Investment Executive | April 7, 2020)

In the first three instalments of [Ellen's Positive Notes](#), I wrote about how to speak and listen to your clients during these trying times. Emails complement — but do not replace — direct verbal communication with your clients. Here are some suggestions to make your emails to clients as effective as possible.

1. Try to make your emails less technical and more conversational. Clients are more likely to read and digest emails that are conversational in tone. To accomplish this, write emails in your own voice. If you speak plainly (like I do), write using that same type of language. If you try to emulate someone else's tone or someone else prepares the emails for you, you may miss the mark.
2. How are your writing skills? Anything you write is a reflection of your professionalism. Make sure you double-check your grammar and spelling. Even better, ask someone to proofread your emails for you, even if you think of yourself as a prolific writer. Another person can also give you feedback on your content and tone.
3. Do a compliance check. Consider MFDA/IIROC and securities commission requirements before sending mass emails, which need advance approval. During this pandemic, ask your compliance officer or supervisor if there are any changes to the process to ensure your emails are not delayed while waiting for approval.
4. Be short and to the point. Clients are stressed and need you to get to the point quickly. If your email is longer than a page or so, your clients might not read it and your effort will be wasted.

5. Do what you say you will do. If you tell clients you will be calling each of them, make sure you follow a schedule and call them. If you say you will send a mass email weekly, do it! People will trust you if you are reliable, especially during hard times, so keep building that trust.

6. Share something personal. It could be a photo of you at home, a picture of your kids or a family pet. It could be something you have done to adjust to the pandemic. With a mass email, try to insert a bit of a personal touch. It will go a long way to comfort your clients and remind them that they are not alone. It might even put a smile on their faces.

Remember, no email, however good it may be, can replace a phone call or video conference with your clients. But if you have been calling clients regularly and have a good relationship with them, emails can complement your communication strategy.

As for me, please keep your emails coming with ideas and comments. These warm my heart and help me a lot. I want to thank Howard Mix for reaching out to me with a heartwarming note and providing me with this topic and much of this column's content.