



February 26, 2023

<<First Name>>,

As successful entrepreneurs, your time is valuable, and you deserve a service experience that reflects your hard-earned success.

You definitely know the difference between sitting on hold or being treated like just another number, versus a VIP level of hospitality and personal service. Where people know your name... and your preferences, and treat you like family.

My goal for our PACIFIC CAPITAL team is to only bring on board the best of the best... people who are experts in their professional role, and who are good character people. In the 21 years, I've been in this business, I've made a couple of mistakes in hiring, but we've learned from those situations and only gotten better.

One thing I've really learned: skills and knowledge can be trained for, so prioritize attitude, energy and high integrity!

I hope you'll take a minute to [watch that short video](#) above about Josh, our Director of Financial Planning. If you're a client of ours, you already know him well! Josh and each member of our team are here to make sure you have the best experience possible.

As a high net worth individual, you deserve a service experience that is highly personal to what you want and needs. Our team is here to listen, advise, and support you every step of the way.

I just got off the phone tonight with a client whose home was broken into this week and their safe was stolen with a lot of important documents and valuables in it. I really love his family and wanted to make sure he knows we're doing things to help him right now. He said: "It feels great always knowing you and your team are supporting us and watching out for us."

That's what this is all about: It's a relationship business that's highly personal.

Thank you for your trust and confidence in our team. Have a great week!

Sincerely,



M Matt

"The care and effort they put into taking care of our needs is unbelievable! It's been a great experience and I would highly recommended them."



Schedule a Call

Refer Someone