

## Video Title: Intro to Presidio



Target Audience: Prospects, Clients, COIs  
Estimated Total Runtime: <1:00  
Strategy: Post on website, social media, send in email

[LT: Eric B. Soiland, CFP®, CIMA®, CIMC®  
Managing Director  
Presidio Group Wealth Management]

[Eric]

I'm excited to share that I've joined Presidio Group Wealth Management as the next evolution of how I run my business.

This move allows me to offer you even more resources, expertise, and support, all while maintaining, and possibly enhancing the personalized service you've come to expect.

By working with this new talented team, I can tap into a wider range of perspectives, expertise, knowledge and skills, seeking to ensure a faster, more responsive experience.

You'll always have someone available, even if I'm on vacation, and in the unlikely event that anything happens to me, Presidio's well-vetted team will ensure continuity in your financial journey.

What stays the same? You'll still work directly with me, reach me at the same email and office, and there's no increase in fees.

The only difference is the added benefit of a team behind me, ready to offer even more value to you and those you care most about.

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**Email Subject Line:** VIDEO: A New Chapter for Your Financial Journey

### **Email Copy:**

I've recently joined Presidio Group Wealth Management, and I'm excited to share how this change benefits you.

With access to a broader team, more resources, and enhanced support, I can offer you a potentially higher level of service—all without changing the way we've worked together.

Watch my short video to learn how this move will provide even more value to you.

[Thumbnail hyperlinked to video]

If you have any questions, don't hesitate to reach out.

[Add 'Schedule a meeting with me' link]

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**Social Tease:**

I've taken an exciting step forward by joining Presidio Group Wealth Management, a move that will allow me to offer my clients more resources, expertise, and support.

While nothing changes about the relationships we have been nurturing for years, the added benefit of a talented team behind me means clients get even more personalized service and resources.

Excited to see how this change will benefit you? Let's connect through the link in the comments.

#InvestmentPlanning #WealthManagement #ClientFirst #Teamwork #PresidioWealth

[Direct Upload mp4 file]

[Add 'Schedule a meeting with me' link in comments]

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**Website Blog/YouTube Title:** A New Chapter for Your Financial Journey

**Website Blog/YouTube Copy:**

Big changes are underway, and I'm thrilled to share the exciting news with you: I've joined Presidio Group Wealth Management. This move represents the next evolution of how I serve my clients—bringing even more resources, expertise, knowledge and support to the table. By working alongside a team of top-notch financial professionals, I'm able to provide you with a greater range of perspectives, quicker response times, and stronger backup if anything were to happen to me.

While nothing changes in terms of who I am or how we work together, this shift allows me to deliver a potentially higher level of service. I'm still your dedicated financial advisor, still in the same office, and still reachable at the same email. There's no change to your fees either. What you'll notice is the added benefit of having a whole team behind you, with a wider range of skills, experience and expertise to draw upon.

Ultimately, this move is about one thing: providing you with a more seamless, supportive experience that helps you achieve your financial goals with greater confidence.

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