**Sample** **Announcement Letter**

**Following is a template for an upstream merger letter to clients. This letter is only an example and should be modified for any statements that could be considered misleading in your specific situation or that do not apply to a particular client.**

Dear [client],

We are pleased to announce our forthcoming merger with ABC Company. It is scheduled to take place officially on January 1, \_\_\_\_. On that date our combined firm will begin conducting its practice as ABC Company.

Our firm began its professional practice in \_\_\_\_. Its growth over that span of time has been predominantly internal, stemming from referrals by our clients and those of other professionals. The growth and development of our professional staff has evolved in a similar manner. We have attracted high-quality, committed professionals and invested in their training, development, and growth. As a result of those efforts, we have experienced good growth over the past several years. This has been in no small way also directly related to the success our clients have had in their business and personal pursuits.

We decided to seek an affiliation because we believe that a larger organization will allow us to provide a wider array of services and more depth. A larger organization will also mean our associates will benefit from even more and stronger career opportunities.

ABC Company shares the same values we do. We conducted an extensive search within our region looking for an opportunity like this. ABC Company exceeded our hopes for a firm we can combine with and continue the tradition we have for excellent service, deep expertise, and an environment our clients and associates want to be a part of.

There are many new services and areas of expertise we will be able to provide to you in the future. We look forward to discussing these in more depth with you. However, there are several things we want to point out that will not change. Those are:

* You will continue to work with the same people in our firm you have in the past. All of our people are being retained in their current roles.
* Our fee structure will not be modified.
* The services we have provided to you in the past will continue.

We will continue to operate from our current offices. All the contact information for us will remain the same, except our email addresses will change. The convention for those address is [first initial].[last name]@abccpa.com.

If you have any questions about this exciting news and what it will mean for you, please contact any of us at any time. We look forward to introducing you to some of our new partners and associates.

We are grateful to you not only for giving us the opportunity to provide you with accounting services but for your loyalty and friendship. We are confident that our new affiliation will serve us all well.

The Partners and Associates of

XYZ Company