

Date: [Insert Date]

To: [Lender Name/Contact Person]
Company: [Lending Institution Name]

Subject: Streamlining Pre-Approval Process and Client Referral - [Client Name]

Dear [Lender Name],

I am writing to refer my client, [Client Name], to you for the mortgage pre-approval process. To ensure a streamlined experience and a quick turnaround, I have advised the client to have the following documentation ready for your review:

- Proof of Income (Pay stubs/W-2s)
- Tax Returns (Past 2 years)
- Asset Statements (Bank/Investment accounts)
- Valid Identification

My goal is to position [Client Name] as a strong buyer in the current market. Please provide a formal pre-approval letter once you have completed your assessment. I would also appreciate being kept informed of the status of their application so we can proceed with property viewings accordingly.

Thank you for your assistance and for providing [Client Name] with excellent service.

Sincerely,

[Your Name]
[Your Title/Company]
[Your Phone Number]
[Your Email Address]

Client Contact Information:

Name: [Client Name]
Phone: [Client Phone]
Email: [Client Email]