

[Your Name]
[Your Company Name]
[Your Address]
[City, State, Zip Code]
[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Dear [Client Name],

It has been a pleasure working with you to achieve your financial goals. As we have discussed, effective wealth preservation requires a coordinated approach, particularly regarding estate planning and real estate management.

I am writing to ask if you have friends, family members, or colleagues who might benefit from the same specialized focus on protecting their legacy and optimizing their property assets. My goal is to help individuals ensure their wealth is transferred efficiently and their real estate investments are properly structured for long-term growth.

If you know someone who is currently reviewing their estate plan or considering significant real estate transactions, I would appreciate the opportunity to introduce myself. You can share my contact information with them, or I would be happy to reach out if you would like to provide an introduction.

Thank you for your continued trust and for any recommendations you may provide.

Best regards,

[Your Signature]
[Your Printed Name]
[Your Phone Number]
[Your Email Address]