

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

[Date]

[Recipient Name]
[Recipient Title]
[Recipient Company Name]
[Recipient Address]

Subject: Strategic Partnership Opportunity for High-Net-Worth Client Services

Dear [Recipient Name],

I am writing to you because of your firm's reputation for providing exceptional service to high-net-worth individuals. Having followed your work in [Mention Recipient's Specialty, e.g., Tax Law or Estate Planning], I believe there is a significant opportunity for us to collaborate to enhance the value provided to our mutual clients.

As a Wealth Advisor specializing in [Your Specific Niche, e.g., Multi-Generational Wealth or Exit Planning], I focus on integrated financial strategies that go beyond simple investment management. Many of my clients are currently in need of the sophisticated [Recipient's Service] that your firm provides.

I am looking to establish a formal referral relationship with a trusted professional who shares my commitment to discretion, technical excellence, and white-glove service. I believe a partnership between our firms could offer our clients a more seamless and comprehensive wealth management experience.

I would welcome the opportunity to introduce myself and learn more about your practice. Are you available for a brief introductory call or a coffee meeting on [Date] or [Date]?

I look forward to hearing from you.

Best regards,

[Your Signature]

[Your Printed Name]