

Date: [Insert Date]

To: [Recipient Name/Financial Professional Name]

From: [Your Name]

Subject: Referral for First-Generation Wealth Building Services

Dear [Recipient Name],

I am writing to introduce [Name of Person Being Referred], who is currently focused on establishing a long-term financial foundation for their family. As a first-generation wealth builder, they are seeking professional guidance to navigate the complexities of asset accumulation, investment strategies, and estate planning.

Given your expertise in helping individuals break cycles of financial instability and create lasting generational wealth, I believe your services would be a perfect match for their goals. They are specifically interested in learning more about:

- Strategic investment management
- Tax-efficient wealth transfer
- Financial literacy and legacy planning
- Protecting newly acquired assets

I have copied [Name of Person Being Referred] on this email so that you can connect directly. I would appreciate it if you could provide them with an initial consultation to discuss their roadmap for the future.

Thank you for your time and for the excellent work you do in helping families build permanent legacies.

Best regards,

[Your Name]

[Your Phone Number]

[Your Email Address]