

[Your Name]  
[Your Agency Name]  
[Your Address]  
[City, State, Zip Code]  
[Your Phone Number]  
[Your Email Address]

[Date]

[Recipient Name]  
[Recipient Title]  
[Company Name]  
[Address]  
[City, State, Zip Code]

Dear [Recipient Name],

I am writing to you because I believe there is a significant opportunity for our two businesses to form a strategic partnership that would provide enhanced value to our mutual clients.

As an insurance professional specializing in [Your Specialization, e.g., Commercial Risk or Personal Lines], I frequently work with clients who are in need of the high-quality [Recipient's Industry/Service] that your firm provides. Similarly, I believe many of your clients could benefit from a comprehensive review of their insurance portfolios to ensure they are adequately protected while optimizing their costs.

A partnership between [Your Agency Name] and [Recipient Company Name] would allow us to:

- Provide a seamless, holistic service experience for our clients.
- Generate high-quality, pre-qualified referrals for both parties.
- Increase client retention through value-added expert consultations.
- Expand our respective market reach through co-branded initiatives.

I have followed [Recipient Company Name]'s work in the community and have been impressed by your reputation for [mention a specific strength of theirs]. I believe our professional values align perfectly, making this a natural collaboration.

I would welcome the opportunity to buy you a coffee or jump on a brief 15-minute call to discuss how we might structure a referral program or joint venture that benefits everyone involved.

Are you available for a brief conversation on [Day of the week] at [Time]?

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title]