

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

[Date]

[Partner Name]
[Partner Title]
[Wealth Management Firm Name]
[Address]

Dear [Partner Name],

I am writing to formally introduce [Client Name] to your firm. [Client Name] is a long-standing client of mine who has recently expressed interest in diversifying their portfolio through high-end real estate acquisitions.

As a specialist in the luxury property market, I am currently assisting them with the identification of off-market opportunities and premium estates. Given their complex financial profile and long-term wealth preservation goals, I believe your expertise in private banking and bespoke wealth management would be an invaluable asset to them during this transition.

I have discussed your services with [Client Name], and they are expecting a call from your office to schedule an introductory consultation. I have copied them on this correspondence to facilitate the connection.

I look forward to collaborating with you to ensure [Client Name] receives the highest level of integrated service for their property and investment needs.

Best regards,

[Your Signature]

[Your Printed Name]