

[Date]

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

Dear [Client Name],

In our recent conversations regarding your long-term financial goals, you mentioned your interest in acquiring a vacation property in [Target Location/Area].

As part of my commitment to managing your total wealth profile, I want to ensure you have the best professional guidance for this lifestyle investment. I have worked closely with [Real Estate Agent Name] from [Real Estate Agency], who specializes in the high-end vacation home market in that region.

I have taken the liberty of introducing you via this letter. [Agent Name] understands the importance of aligning a property purchase with an overall financial plan and has a proven track record of finding exclusive, off-market opportunities for clients with similar profiles.

I have included their contact information below:

[Real Estate Agent Name]
[Agency Name]
[Phone Number]
[Email Address]

I will follow up with you next week to see if you would like me to facilitate a formal introductory call. In the meantime, please feel free to reach out if you have any questions regarding how this purchase fits into your current portfolio strategy.

Best regards,

[Your Name]
[Your Title]
[Your Firm Name]