

[Your Name]
[Your Title]
[Your Boutique Firm Name]
[Your Phone Number]
[Your Email]

[Date]

[Recipient Name]
[Title]
[Corporate Firm Name]
[Address]

RE: Referral of Commercial Real Estate Portfolio - [Client Name/Entity]

Dear [Recipient Name],

I am writing to formally refer a long-standing client of my boutique firm, [Client Name], to your team at [Corporate Firm Name].

For the past [Number] years, I have managed [Client Name]'s local commercial requirements. However, their portfolio has recently expanded to a scale and geographical diversity that requires the robust resources, international platform, and specialized departments that your corporate firm provides.

The portfolio currently consists of:

- [Number] Assets total
- Primary Asset Classes: [e.g., Industrial, Class A Office, Multi-family]
- Total Square Footage: [Approximate Amount]
- Key Locations: [List Cities/Regions]

I believe your expertise in [Specific Service, e.g., Institutional Asset Management or Capital Markets] aligns perfectly with the client's current objectives for optimization and further acquisition. I have briefed the client on your firm's capabilities, and they are eager to discuss a transition.

I have attached a summary of the current holdings and the client's contact information. Please let me know your availability for a brief call to discuss the referral fee agreement and to coordinate a formal introduction.

Sincerely,

[Your Signature]

[Your Printed Name]