

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Email Address]

[Date]

[CPA Name]

[Accounting Firm Name]

[Address]

[City, State, Zip Code]

Dear [CPA Name],

I am writing to you because of your reputation for providing exceptional tax and financial guidance to your clients. As an insurance professional specializing in annuity solutions, I am looking to establish a strategic partnership with a trusted CPA to better serve local business owners and retirees.

Many of my clients often require sophisticated tax planning regarding their retirement distributions, RMDs, and estate transfers. Conversely, I find that many taxpayers are seeking ways to protect their principal and create guaranteed lifetime income-areas where specific annuity products can provide significant value when integrated into a tax-efficient plan.

I believe a referral partnership between our offices could offer your clients a more holistic approach to their financial health. I am committed to a collaborative process where your tax expertise remains the primary guide for the client's financial decisions.

I would appreciate the opportunity to introduce myself and discuss how we might work together to benefit your clientele. Are you available for a brief introductory meeting or a coffee next [Day of the week] at [Time]?

Thank you for your time and consideration. I look forward to hearing from you.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Title/Licenses]