

[Your Name/Company Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Date]

[Recipient Name]

[Recipient Agency Name]

[Agency Address]

[City, State, Zip Code]

RE: Client Referral for [Client Name]

Dear [Recipient Name],

I am writing to formally refer my client, [Client Name], to your agency for professional retirement income planning services.

[Client Name] is currently exploring options to ensure a stable financial future and requires specialized expertise in managing post-retirement distributions, tax-efficient withdrawal strategies, and long-term wealth preservation.

I have discussed your agency's reputation and services with [Client Name], and they are interested in scheduling a consultation to review their current portfolio and retirement goals. You may contact them directly at [Client Phone Number] or [Client Email Address].

I have attached the necessary authorization forms and relevant financial summaries to assist with your initial assessment. Please let me know if you require any additional information regarding this referral.

Thank you for providing your expertise to my client. I look forward to hearing about their progress.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Job Title]