

[Your Name]
[Your Title]
[Your Company]
[Date]

[Recipient Name]
[Recipient Title]
[Recipient Company]

Subject: Protecting the Future of [Client's Business Name]

Dear [Recipient Name],

I am writing to introduce you to [Client Name], the owner of [Client's Business Name]. I have had the pleasure of working with [Client Name] as their [Your Relationship, e.g., Accountant/Attorney], and we have recently been discussing the long-term continuity and succession planning for their business.

During our planning sessions, it became clear that a robust funding mechanism is needed to support their buy-sell agreement and protect the company against the loss of key personnel. Given your expertise in business succession life insurance, I believe you are the best person to help them structure a policy that ensures a smooth transition and provides financial security for the stakeholders.

I have copied [Client Name] on this email so that you may connect directly. I have also encouraged them to share the relevant details of our current succession framework with you to facilitate your analysis.

Thank you for taking the time to assist [Client Name]. I am confident that your guidance will be invaluable to their business goals.

Sincerely,

[Your Signature]
[Your Phone Number]
[Your Email Address]