

Dear [Client Name],

It has been a pleasure working with you to manage your [Current Service, e.g., Investment Portfolio]. My primary goal is to ensure that every aspect of your financial life is secure and optimized.

In reviewing your overall strategy, I believe you could benefit from expert guidance regarding [New Service, e.g., Estate Planning or Tax Strategy]. While I handle your investments, I work closely with a trusted specialist, [Partner Name/Company Name], who excels in this area.

I have collaborated with them on behalf of many clients to ensure their comprehensive financial goals are met. If you are interested, I would be happy to introduce you to them for a brief consultation to see how their services might fit your needs.

Please let me know if you would like me to facilitate an introduction or if you have any questions.

Best regards,

[Your Name]

[Your Title]

[Your Company Name]