

[Your Name]
[Your Title/Company]
[Your Phone Number]
[Your Email Address]

[Date]

[Recipient Name]
[Recipient Address]
[City, State, Zip Code]

Subject: Introduction to [Referral Name] - Wealth Management Services

Dear [Recipient Name],

I am writing to formally introduce you to [Referral Name], a [friend/colleague/client] of mine who is currently seeking sophisticated wealth management and estate planning guidance.

Given your expertise in managing complex portfolios and your firm's reputation for servicing high-net-worth individuals, I believe your approach would align perfectly with [Referral Name]'s financial objectives and long-term goals.

I have copied [Referral Name] on this email so that you may connect directly to schedule an introductory conversation. I have also provided their contact information below for your records.

[Referral Name]
[Referral Email]
[Referral Phone Number]

I hold your professional services in high regard and feel confident that this introduction will be mutually beneficial.

Best regards,

[Your Signature]

[Your Printed Name]