

[Your Name]
[Your Title/Law Firm Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Date]

[Recipient Name]
[Recipient Title]
[Wealth Management Firm Name]
[Address]
[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally introduce myself as Corporate Counsel for [Your Company Name/Client Name] and to express an interest in establishing a professional collaboration with your firm.

In my capacity as legal counsel, I oversee corporate governance, risk mitigation, and structural planning. I recognize that legal strategies and wealth management objectives are most effective when they are closely aligned. Given your firm's reputation for excellence in [Specific Area of Wealth Management, e.g., estate planning or asset protection], I believe there is a significant opportunity for us to provide a more holistic service to our mutual clients.

My goal is to ensure that the corporate legal frameworks I implement are synchronized with the long-term financial and investment goals managed by your team. I would welcome the opportunity to discuss how we can streamline our communication to better serve the interests of [Client Name].

Are you available for a brief introductory call or meeting on [Date] or [Date] at [Time]? I look forward to the possibility of working together.

Sincerely,

[Your Signature]

[Your Printed Name]