

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

[Recipient Name]
[Firm Name]
[Address]

Dear [Recipient Name],

I am writing to formally introduce [Prospect Name], who is seeking professional wealth management and investment advisory services.

[Prospect Name] is a [Business Owner/Executive/Professional] with a complex financial profile. Based on our recent discussions, I believe their requirements regarding [Specific Need, e.g., Estate Planning, Tax Optimization, or Portfolio Diversification] align perfectly with the expertise and high-touch service provided by your firm.

I have spoken with [Prospect Name] about your firm's track record and approach to managing significant private wealth. They are interested in exploring a potential relationship and would welcome an initial consultation.

You can reach [Prospect Name] directly at [Phone Number] or [Email Address]. I have also copied them on this communication to facilitate the introduction.

I trust you will provide them with the same level of excellence you have shown my other associates. Please let me know if you require any further background information.

Best regards,

[Your Signature]