

[Date]

[Recipient Name]

[Recipient Title]

[Company Name]

[Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally introduce you to [Client Name], the owner of [Client's Business Name]. Based on our recent discussions regarding their long-term objectives, it is clear that they are entering a critical phase of business succession planning.

As we have worked together on various wealth management strategies in the past, I believe your expertise in [Specific Area, e.g., Tax Strategy, Estate Planning, or M&A] would be invaluable in helping [Client Name] navigate the complexities of transitioning their business while preserving their personal wealth.

[Client Name] is specifically looking for guidance on [mention 1-2 specific needs, e.g., business valuation, exit strategies, or family governance]. I have suggested that a consultation with you would be the best next step in ensuring their legacy and financial security are protected.

I have copied [Client Name] on this email/letter so that you may coordinate a time to connect directly. Please let me know if there is any additional background information I can provide to assist in your initial conversation.

Thank you for your professional attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Phone Number]

[Your Email Address]