

PRESTIGE REFERRAL EMAIL TEMPLATE

Subject: Introduction

Dear (Prospective Client's Name):

I was recommended to you by our client (Client's Name). They thought it would be beneficial for us to connect. I wanted to send you a quick email in advance so that when my number came up, you knew I wasn't a telemarketer. I will give you a call in the next couple of days to see if we could find a couple of minutes to catch a cup of coffee.

Look forward to meeting you.

Regards,
(Your Name)
999-999-9999

Subject: Introduction

Dear (Prospective Client's Name):

I look forward to meeting you next Wednesday the 7th at 12 Noon at (Meeting Place) by your office. I will share with you the special management techniques we use to help clients accumulate and protect their wealth. As discussed, I will be mailing you a hard copy of our confidential Questionnaire (a soft copy is attached as well). As I previously mentioned, if you have a moment to fill out the Background Information on Page 1 that would be great, although it is not required for our meeting.

I look forward to meeting you next Wednesday at 12 Noon.

Regards,
(Your Name)
999-999-9999