Email Introduction to COI Referred by Client

Hello [First name],

[Name of client] suggested that I get in touch with you. [Client’s first name] is a [wealth management/financial planning/investment management] client of mine at [firm name], and he/she mentioned how much he/she enjoyed working with you.

As a [wealth manager/financial advisor/investment advisor], it is a regular part of my practice to get to know my clients’ [tax/legal/insurance] professionals so that when necessary, we can work together to meet the needs of our mutual clients. I also like to learn more about different professionals and their practice, as I am always on the lookout for competent [tax/legal/insurance] professionals to whom I can refer my other clients.

If you’re interested in meeting to see how we can potentially work together to better serve our mutual client, please provide some times over the next few weeks that would be convenient for you for breakfast, lunch or coffee.

I look forward to hearing from you soon.

Best regards,

[Your Name]