

*[Instructions: Create a word document with the referral's information. Ask the CPA to print the personalized client introduction letter on his/her letterhead.]*

[Date]

[Referral's First Name, Last Name]

[Company Name]

[Street Address]

[City, State, Zip]

Dear [First Name],

I want to take this opportunity to introduce [Insurance Professional's Name]. [He/She] regularly works with [individuals/businessowners] like you to help them address their financial goals and insurance needs.

With your permission, I will have [Insurance Professional's Name] contact you within the next week to arrange time for a brief introductory meeting to better understand your situation. If you would prefer to contact [him/her] directly, here is [his/her] contact information:

[First Name, Last Name]

[Company Name]

[Street Address]

[City, State, Zip]

[Phone Number]

[Email Address]

[Website Address]

If you have any questions or concerns, please give me a call at [Phone Number].

Sincerely,

[CPA's Name]

*[Instructions: Please remember to clearly state any financial interest that needs to be disclosed (i.e. splitting commissions), additional broker-dealer affiliation and insurance license number as applicable at the bottom of this letter.]*