

Referral Messages

Below are the 6 emails that make up the referral campaign. These emails will be sent quarterly over the next 18 months.

Email 1 (October 2021)

Subject line: Can you refer a friend?

As the year winds down, we want to express how grateful we are to have you as a client. Your confidence and trust motivate us to help you diligently pursue your financial goals.

Businesses grow one person at a time. If you can think of someone who might also benefit from connecting, please pass along an introduction. The process is easy; just click the button below to get started.

[BUTTON: "SEND REFERRAL"]

Most individuals enjoy and benefit from an informal conversation or second opinion, even if they are not actively looking for a financial professional. Your trust is valued, and every referral is treated with the same confidentiality and professionalism extended to all clients.

Thank you again,

[SIG BLOCK]

Email 2 (January 2022)

Subject line: Referral request - thank you!

When a client refers a friend, family member, or colleague to us, it's a sign of trust and confidence that we don't take lightly. Many of our clients have recommended us to others, and we're always grateful.

Do you know someone who might benefit from a conversation with a financial professional? Our services go far beyond investment strategy and retirement preparation and benefit individuals from many walks and phases of life.

If someone is coming to mind, please don't hesitate to send them our way. The process is easy; just click the button below to get started.

[BUTTON: "SEND REFERRAL"]

Thank you in advance. Your trust is appreciated, looking forward to working with you for years to come.

Sincerely,

[SIG BLOCK]

Email 3 (April 2022)

Subject line: Pay it forward

Just reaching out to express gratitude for your business. Please consider helping me connect with friends, family, and colleagues who you feel might be ready for a strong and beneficial relationship.

Is someone coming to mind? Click the button below to send them my way.

[BUTTON: "SEND REFERRAL"]

Thank you in advance for your trust. Personalized recommendations from clients like you are a high compliment that we don't take for granted.

Sincerely,

[SIG BLOCK]

Email 4 (July 2022)

Subject line: The best clients know the best clients

The best clients have come from personal referrals from clients just like you. A referral is a thoughtful way to help people work towards their financial goals with knowledge and service. Clients should always feel assured that they can rely on professional guidance, especially in times of change.

If you know someone in need of a trusted financial professional, I'd like to help. Would you please help me connect with them?

[BUTTON: "SEND REFERRAL"]

Thank you so much for your trust and your business.

Sincerely,

[SIG BLOCK]

Email 5 (October 2022)

Subject line: Can I ask a favor?

Hope all is well! Just sending you a quick note for two reasons.

First, thank you for your business.

Second, I'm interested in helping more individuals with their financial needs. If you have friends, family, or colleagues who you think might benefit from connecting with me, please consider sending them my way as a referral. I've made the process easy; just click the button below.

[BUTTON: "SEND REFERRAL"]

Thank you for helping me reach more people!

Sincerely,

[SIG BLOCK]

Email 6 (January 2023)

Subject line: Help a friend at the start of the New Year

As the new year begins, we're thinking of you with gratitude for your confidence and trust.

Businesses grow one person at a time. If you can think of someone who wants to start the year with a fresh financial outlook, please consider setting up an introduction. The process is easy. Just click the button below to get started.

[BUTTON: "SEND REFERRAL"]

Most individuals benefit from an informal conversation or second opinion, even if they are not actively looking for a financial professional. Please know that every referral is treated with the same confidentiality and professionalism extended to all clients.

Sincerely,

[SIG BLOCK]