

EMAIL INTRODUCTION TEMPLATES



Email Introduction #1



Made by Client Bob Jones

To	Laura Smith	← Prospect
Cc	Bill Cates	← Advisor
Subject	Someone you should meet	

Laura – I've been doing some financial work with Bill Cates. He has really opened my eyes to a few things I needed to put in place to protect my family and to secure a better retirement.

I've cc'd him on this email, so expect him to reach out to you sometime soon. I think you should take his call. It will be worth a few minutes of your time.

Send



Email Introduction #2



Made by Client Bob Jones

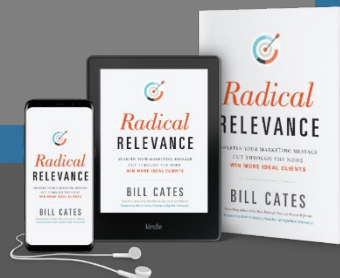
To	Laura Smith; Bill Cates	← Prospect and Advisor
Cc		
Subject	Laura Smith – Meet Bill Cates	

Laura – I want you to meet Bill Cates. We've been doing some financial work together and he's really opened my eyes to a few things I needed to put in place to protect my family and to secure a better retirement.

Bill – Meet Laura. Laura and I have known each other for years. She's one of the smartest and well-connected people I know. She's also a great golfer.

Laura – I highly recommend you speak with Bill. I'm sure it will be time well invested. If you like, I can introduce you over a round of golf.

Send



Email Introduction #3



Made by Client Bob Jones

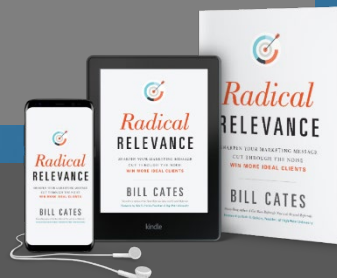
To	Laura Smith; Bill Cates	← Prospect and Advisor
Cc		
Subject	Laura Smith – Meet Bill Cates	

Laura – Remember that conversation we had about retiring without having to take a pay cut? Well, I want you to meet Bill Cates. Bill has been guiding me and Sandra through his process and he’s really opened our eyes to a few things we need to put in place to achieve our long-term goals.

Bill – Meet Laura. Laura and I have known each other for years. She’s one of the smartest and well-connected people I know. She’s also a great golfer.

Laura – I highly recommend you speak with Bill. I’m sure it will be time well invested. If you like, the three of us can meet for lunch next week.

Send



“The Client Bump”

Email Introduction #4 – Made by Advisor Bill Cates

To Laura Smith ← Prospect

Cc Bob Jones ← Client

Subject Laura – Bob Jones suggest I contact you.

Bob Jones has agreed to add to the email chain when he sees it come through – saying nice things about Bill and encouraging the connection.

Laura – My name is Bill Cates. I’ve been doing some financial work with Bob, and he asked me to reach out to you.

I specialize in financial planning for senior-level managers and executives at Emerson Electric. While your company has a good benefits package, there are some areas of exposure you might want to address.

Based on Bob’s urging, I’d like to schedule a brief call (10-15 minutes) to see if it makes sense to continue the conversation. May I send over some time slots for you to consider?

Send

