Cover Letter for Introduction Kit

*This is the cover letter you would use with your Introduction Kit, which is sent to a potential Strategic Partner prior to Meeting 2 at your Office.*

February 10, 2022

Name

Address

Address

Dear [Strategic Ally],

Here is the Introductory Kit I promised you. This is something we send out when we are meeting with a referred prospective client for the first time.

The Introductory Kit is a high-level introduction to our team and our approach to comprehensive financial planning and wealth management. We believe taking exceptional care of our clients is an ongoing process of preparing for and reacting to life’s critical financial events, which can be as diverse as retiring, caring for others, receiving an inheritance, losing a spouse, or other life transitions affecting their financial situation.

With our comprehensive approach, we work collaboratively with other professionals, such as yourself, who also play an important role in helping our clients achieve all that matters most to them. This is one of the reasons I am looking forward to meeting you at your office – to learn more about you, your team, and your approach. This will help us understand how you may be able to help clients who require your type of expertise.

I’m looking forward to meeting you.

Sincerely,

[Financial Advisor Name]

[Financial Advisor Title]