“Thank You” Card

Step 1

*Send the “Thank You” card within 24-48 hours after receiving the Introduction.*

*Handwrite the note and use a stunning, memorable card. Refer to sample scripting below.*

*If appropriate, add a personal note about something that connects your client to the person they’ve introduced (i.e., based on their Client Profile information).*

Dear [Client/Center of Influence/Other],

I want to thank you for recently introducing me to [name of individual introduced].

I deeply appreciate your continued trust and confidence.

As always, I look forward to continuing to help those important to you.

Sincerely,

Advisor's Signature