

TEXT Message Example

Hey [name] I wanted to give you a heads up that my friend Chris is going to be giving you a call. He's been helping me with some of my savings and financial strategies, and he has been great. I'm not sure if he can help you in the same ways he helped me, but it was a very educational process and I think you'd definitely be able to benefit from meeting him. When we met the other day, I thought of you and just wanted to give you a heads up. Hope all is well.
[name]

Email Example 1

Dear Prospect,

I am writing to introduce you to my agent, who is with _____. I have worked with (Name) for XX years and have found his/her services to be very valuable. He/she truly takes a personal interest in your goals and tries to help you reach those on a needs basis approach. I have found (Name's) honesty, education, and experience to be a breath of fresh air. Please take just a few moments to allow (Name) to introduce him/herself. I do not think you will be disappointed.

Warm regards,

Client

Email Example 2

Hi,

Hope all is well. For some time now, I've been working with an agent who is with _____. (Name) works with people to help them identify their financial security needs then focuses on solutions to help make those goals a reality.

Recently, (Name) asked me who I thought might benefit from meeting him/her, and I thought of you. I know everyone gets called by these guys but this call may be quite productive. As a first step, (Name) will just want to meet you and introduce him/herself to you. It goes without saying; I wouldn't refer you if I thought it might be a waste of your time.

Feel free to contact me if you have any questions I can answer.

Thanks,