Sample Follow Up Referral Request Letter to send out after a Portfolio Review

Dear Client

Thank you for taking the time to review your portfolio. We feel it is always a good idea to evaluate your personal and financial goals before taking any specific investment action. These meetings help us to assess your current investment plan and determine any gaps in your ability to obtain your desires and help manage any risks that may place those goals in jeopardy.

We ask for your assistance in finding other successful individuals who need the services of an investment professional. All of our new business is created from referrals and your help would be greatly appreciated. If you know of anyone who could benefit from sitting down with us, simply pass our card along to them.

We look forward to demonstrating our professionalism and service over the years ahead.

Sincerely

**MUST BE APPROVED BY YOUR COMPLIANCE DEPARTMENT, PRIOR TO USAGE**