## STRATEGY 5: NAIL THE WEALTHY CLIENT EXPERIENCE

## Do Not Call Letter Template

Dear Mr./Mrs./Ms. Prospective client's name,

I am a financial advisor and I have been working with client's name for some time. He/She suggested that I contact you. Client's name has spoken highly of you and thought that you might be able to benefit from our second-opinion service. He/She wanted you to know about the comprehensive process that we use in helping clients to maximize the probability of achieving all that is important to them.

I work with only a limited number of select clients for whom I can make a major impact. While I do not yet know if our second-opinion service would be appropriate for you, I do know that it has made a tremendous positive impact on the many individuals—whether they decided to go on to work with us or not.

Because client's name is a very important client, I would be more than happy to set up what we call our Discovery Meeting to determine where you are now financially, where you want to go and any gaps that need to be filled. If we would be able to assist you in addressing your financial goals, we will let you know that. If it turns out that we are not the right firm for you, we could offer you recommendations for other firms that might better meet your needs.

I noticed that you are on the national do not call list. I believe that the list is a great step forward in preserving privacy for all of us, but it does prevent me from calling you directly. If you would like me to contact you, please sign and return the enclosed postcard. Upon receipt of the card, I will call you to set up a time to meet.

I will look forward to talking to you and determining whether I can help you in achieving your financial goals.

Sincerely,

Financial advisor's name