## STRATEGY 6: BUILD AND MANAGE YOUR PROFESSIONAL NETWORK

## Mutual Client Email Template

Subject line: Conversation regarding mutual client's name

Dear prospective network member,

Our mutual client, mutual client's name, asked me to reach out to you to share the notes I collected from our last consultation. Please see the attached PDF, which contains the Total Client Profile I created of mutual client's name.

mutual client's name was very complimentary about the quality of work you have done over the years. I would like to have a short conversation with you, off the clock, to explore how we might work collaboratively to help them achieve their goals. My assistant, assistant's name, will contact you to schedule a phone appointment.

I look forward to collaborating with you to help mutual client's name achieve all that is important to them.

Best of success,

Financial advisor's name

CC: mutual client's name

Attachment: Total Client Profile for mutual client's name