

[Your Full Name]

[Your Title/Firm Name]

[Phone Number] | [Email Address]

[LinkedIn Profile/Website]

[Date]

[Client Name]

[Client Address/Company Name]

Dear [Client Name],

I am writing to formally introduce myself as a Financial Consultant specializing in [Specialization/Niche]. Having followed your recent [Achievement/Business Milestone/Industry Move], I believe there is a significant opportunity to align your financial structure with your long-term objectives.

In working with clients in similar positions, my focus remains on [Key Service: e.g., Wealth Preservation, Tax Optimization, or Capital Allocation]. My approach is rooted in data-driven strategies that prioritize risk mitigation while maximizing sustainable growth. Specifically, I have helped clients navigate [Specific Financial Challenge] to achieve [Quantifiable Result].

I would welcome the opportunity to discuss your current financial roadmap and explore how my expertise can provide additional value to your portfolio. I am available for a brief introductory call on [Day of Week] at [Time], or at a time that best suits your schedule.

Thank you for your time and consideration. I look forward to the possibility of working together.

Sincerely,

[Your Signature/Typed Name]