# **Sample Emails from “Do It For Me” Program to be Used to Connect with COIs**

## Build Relationships with CPAs

**Subject Line:** We Share Some Clients… Let's Talk

My name is (INSERT NAME). I am a financial advisor here in (INSERT CITY). We share a mutual client, (CLIENT/FAMILY NAME), who speaks very highly of you and the guidance you provide. As I work with (CLIENT/FAMILY NAME), I realize that supporting (them/him/her) to the best of my ability means making myself available to (their/his/her) other trusted advisors, including you.

We both know that working with clients to navigate a post-pandemic world… one that features an ever-evolving tax landscape, complex investment options, and ongoing market volatility, is a challenge – for them and us. I believe a little communication between our offices will go a long way toward delivering optimal service to (CLIENT/FAMILY NAME) and creating efficiencies for all of us.

Here are a few examples:

* **Make coordinated recommendations.**
Often, a client’s investment decisions impact their taxes… sometimes negatively. I would welcome the opportunity to work together and discuss the tax implications of various investment options (e.g., tax-loss harvesting or a Roth conversion) to ensure both tax and investment outcomes are considered.
* **Obtain paperwork quickly.**
We’ll work with you to ensure you have all the investment-related tax documents needed to prepare your clients’ returns. Whether it’s 1099s, cost basis information, or other investment-related documents, we are familiar with what CPAs need and can be a resource to make your lives easier.
* **Keep apprised of clients’ estate and wealth transfer plans.**
Especially with the sunsetting of existing gift tax exemptions and other provisions in 2025, being aware of your client’s investment holdings and estate plan – including beneficiaries – is key to having a holistic strategy to minimize tax liability today, in 2026, and beyond.

If you agree this is a collaboration worth exploring, I would love to get together to learn more about your practice and tell you about mine. I’m also always on the lookout for well-regarded professionals to whom I can refer my clients, so please let me know if you are accepting new clients.

I look forward to hearing from you.

## Build Relationships with Divorce Attorneys

**Subject Line:** When should you involve a financial professional in a divorce?

Dear [FirstName],

As fellow professionals assisting clients through divorce, we know you are very aware of the complicated financial decisions involved. Unfortunately, we find that a financial professional is often brought into the discussions too late, sometimes after legally binding agreements are underway. We specialize in working with attorneys, CPAs, and other professionals to help provide financial clarity from the beginning of the process.

As we all know, every situation is unique. Some key areas we focus on with clients include:

# Analyzing all assets and liabilities to uncover the complete financial picture.

# Creating accurate budgets aligned with post-divorce realities.

# Forecasting property division and alimony.

# Advising on executive compensation packages and other performance bonuses.

# Stress testing different divorce settlement scenarios.

# Our role is to work alongside you and your team to offer guidance and insights that inform negotiations and help avoid future problems. We'd welcome the opportunity to discuss our services and approach in more detail to see if there might be an opportunity to collaborate and work together during these difficult transitions.

#

# Sincerely,

# [Professional’s Name]

# [Address]

# [Website url]

# [Phone]

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## Build Relationships with Estate Attorneys

**Subject Line:** Introductions

Dear [Estate Attorney Name],

We are a financial advisory firm (located in XXX) specializing in serving high-net-worth clients. We have heard a lot of positive things about your firm and have been wanting to connect.

Our firm works with individuals, families, businesses, and trusts, many of whom have complex tax and estate situations and are looking for an experienced estate attorney. We often find ourselves without an ideal referral and wonder if you are currently accepting new clients.

We would also be interested in potentially inviting you as a guest speaker at one or more of our upcoming client appreciation and education events. Your expertise would be a valuable addition to our programming.

What matters most to you is finding someone you can trust to treat your clients with the same care and compassion you do. At our firm, we understand that because we treat our clients like family. We're confident that you'd be proud to see the dedication and respect we show each individual we serve.

I'd love to connect with you over coffee or lunch to explore potential collaborations. Let me know if you have any availability in your schedule in the coming weeks.

I look forward to connecting with you.

Sincerely,

[Signature]

***Please make sure you submit through your regular compliance review process.***