

New Client Pre-Appointment Thank-You Card

Send the **Thank-You Card** the day of or after receiving the Introduction.

Handwrite the note.

Refer to the sample, below:

Dear [Client/Center of Influence/Other],

Thank you for your introduction to [name of individual introduced].

I have sent [name of individual introduced] an Introduction Kit and I will arrange to meet with them at their earliest convenience.

As always, I appreciate your continued trust and confidence.

Best personal regards,

[Advisor's Signature]

