Sample Referral Confidence Letter

The below sample is a letter you can send to clients to let them know that you maintain the highest professional standards when working with the referrals they send you. This promotes transparency and lets clients know their referrals are being treated with the highest regard. As you want to encourage referral behavior, make sure to include wording about being appreciative of the referrals sent to you. The items in blue require you change the applicable information. You may choose to update other sections as appropriate.

Dear Client,

Over the past few months, we have received several calls with requests that we speak to friends, relatives and associates of our clients. As we are extremely grateful for these referrals and always welcome the chance to speak to the people you recommend, we thought you might like to know how we handle such requests and the standards we adhere to in making these contacts.

We have always considered referrals a great compliment and have happily talked with these individuals about the work we do. We do our very best to provide them with the information they need to make good choices regarding their financial situations. Many of these individuals have become clients, but more importantly, they have all expressed that they feel an increased level of confidence from having spoken with our office regarding their circumstances.

Our goal in writing this letter is to let you know that if and when you would like us to speak with someone you know, we would be happy to meet your request and will maintain the highest professional standards in doing so. Additionally, as a thank you to our clients who refer other to us, we host (insert details about exclusive client event.) We would love to see you join at such an event in the future.

Thank you again for your continued support in helping us to build a great business with our clients and their needs at the center.

Sincerely,

Advisor Name,

Title, Firm Name