[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Introducing Our Private Wealth Management Referral Program

Dear [Client Name],

At [Firm Name], our growth has always been driven by the trust and success of our valued clients. We are honored to manage your wealth and remain committed to providing you with bespoke financial strategies and exceptional service.

We are pleased to announce the launch of our new **Client Referral Bonus Program**. This program is designed to show our appreciation when you introduce your colleagues, friends, or family members to our private wealth management services.

How the Program Works:

- **Refer:** Introduce a qualified individual to your dedicated Wealth Advisor.
- **Onboard:** If the referred individual becomes an active client with a minimum investment of [Amount], they will receive the same high-tier level of service you expect.
- **Reward:** As a token of our gratitude, you will receive a [Bonus Amount/Percentage/Gift] credited to your account or delivered as a [Type of Reward] upon the successful completion of their onboarding.

There is no limit to the number of referrals you can provide. We assure you that any individual you refer will be treated with the utmost confidentiality and professional care.

If you have someone in mind who could benefit from our personalized wealth management approach, please contact your advisor, [Advisor Name], at [Phone Number] or simply reply to this email.

Thank you for your continued partnership and for the confidence you place in [Firm Name].

Sincerely,

[Signature]

[Name of Executive/Advisor]
[Title]
[Firm Name]