

Subject: A Special Thank You for Your Referrals

Dear [Client Name],

At [Firm Name], we are committed to helping you achieve your long-term financial goals. We believe that the greatest compliment we can receive is a referral from a valued client like you.

To show our appreciation, we are pleased to introduce our **Client Referral Bonus Program**. For every friend, family member, or colleague you refer who becomes a client with a qualifying account, we will deposit a **[\$Amount] cash bonus** into your account as a token of our gratitude.

How it works:

- Introduce your referral to your Wealth Manager via email or phone.
- Once your referral opens and funds their new account, your bonus will be processed.
- There is no limit to the number of referral bonuses you can earn.

Your trust is the foundation of our business. If you know someone who could benefit from our personalized wealth management strategies, please let us know.

Thank you for your continued partnership.

Sincerely,

[Wealth Manager Name]

[Title]

[Firm Name]

[Phone Number]

[Website]

Disclaimer: Terms and conditions apply. Minimum account funding required for bonus eligibility. Bonus may be subject to tax reporting.