

[Your Name]  
[Your Title/Organization]  
[Your Address]  
[City, State, Zip Code]  
[Your Email]  
[Your Phone Number]

[Date]

[Recipient Name]  
[Recipient Title]  
[Organization Name]  
[Address]  
[City, State, Zip Code]

Subject: Fiduciary Character Reference for [Candidate Name]

To Whom It May Concern,

I am writing to provide a formal character reference for [Candidate Name] in support of their application for the position of Portfolio Manager. I have known [Candidate Name] for [Number] years in my capacity as [Your Professional Relationship to Candidate].

Throughout our professional association, I have observed [Candidate Name] consistently uphold the highest standards of integrity and ethical conduct. In the financial services industry, where the fiduciary duty to act in the best interests of clients is paramount, [Candidate Name] has demonstrated an unwavering commitment to transparency and accountability.

Specifically, I have witnessed [Candidate Name] manage complex financial responsibilities with meticulous attention to detail. They possess a deep understanding of risk management and have always prioritized the long-term financial health of stakeholders over short-term gains. Their decision-making process is rooted in thorough research and a strict adherence to regulatory compliance and ethical guidelines.

Beyond their technical proficiency, [Candidate Name] exhibits a level of professional discretion and honesty that is essential for a fiduciary role. They communicate clearly with clients, ensuring that all risks and expectations are fully understood, and they have never wavered from their moral obligations, even under significant market pressure.

I recommend [Candidate Name] for this Portfolio Manager position without reservation. I am confident that they will serve your institution and your clients with the same high level of fiduciary care and dedication that I have witnessed firsthand.

Please feel free to contact me if you require any further information.

Sincerely,

[Signature]

[Your Printed Name]