

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

[Date]

[Hiring Manager Name]
[Company Name]
[Company Address]
[City, State, Zip Code]

Subject: Fiduciary Reference for [Candidate Name]

Dear [Hiring Manager Name],

I am writing this letter to provide a formal professional reference for [Candidate Name], who is a candidate for a wealth management position at your firm. I have known [Candidate Name] for [Number] years in my capacity as [Your Relationship to Candidate].

During our professional association, [Candidate Name] has consistently demonstrated an unwavering commitment to the fiduciary standard. I have observed their ability to place client interests above all else, ensuring that every financial recommendation and investment strategy is dictated solely by the client's best interests and long-term objectives.

Key attributes that define [Candidate Name]'s fiduciary conduct include:

- **Transparency:** Maintaining clear communication regarding fees, risks, and potential conflicts of interest.
- **Integrity:** Upholding the highest ethical standards in managing complex portfolios and private wealth.
- **Prudence:** Exercising meticulous due diligence and care in the selection and monitoring of investment vehicles.
- **Compliance:** Strict adherence to industry regulations and internal governance protocols.

Beyond technical proficiency, [Candidate Name] possesses the character required to manage significant assets with the necessary discretion and loyalty. I have full confidence in their ability to act as a trusted advisor and a responsible steward of capital.

I highly recommend [Candidate Name] for any role within your wealth management team. Please feel free to contact me if you require further information regarding their professional conduct or fiduciary experience.

Sincerely,

[Your Signature]

[Your Printed Name]