



BEAUPORT
FINANCIAL
SERVICES

WHERE CARE MEETS CRAFT™

Personal Introduction Email Template for COI's and Existing Clients

Subject

I Thought of You and Your Future Plans

Paragraph ▾

B *I* U A ▾



Hi [Friend's First Name],

I recently had a conversation with my friends at **Beauport Financial** (www.beauportfinancial.com) and it made me think of you. They work with individuals and families who've done well building wealth but want more clarity as they plan for retirement, manage their investments, or think about their legacy and giving.

They're based here in Gloucester and have a great 40-year reputation for being thoughtful, discreet, and deeply rooted in the community. If you're open to it, I'd be happy to have my contact there send you some information via print or email—or you could reach out directly and use my name as a reference. There's no pressure from them—just a conversation to see if it's a good fit.

I think you'll really like these people. Let me know which feels right, ok?

[Your Name]

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