

# CITING MUTUAL CONNECTION SALES INTRODUCTION

## Template

**Subject Line: [Cite mutual connection]**

Hi [contact name],

[Cite mutual connection or decision maker and (if necessary) something you know about the lead].

[Explain your intentions and selling/value proposition]

[Initiate Call to Action]

Thank you,

[Name], [Title]

[Company]

[Email]

[Phone Number]

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## Example Email

### **Subject Line: Madison Batts Told Me to Connect With You**

Hi Rick,

Madison Batts mentioned to me briefly that you were having some issues with your current financial adviser and looking for a switch.

I'd love to schedule a quick call and show you how our personal planning resources and access to a multitude of financial products can get you on track to hit your wealth goals.

Do you have 15 minutes open this week? Looking forward to hearing back and connecting.

Thank you,

Cameron Eck, Adviser

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123-456-7890

[Schedule Appointment Button]