Email Request for Referral (General)

It's a pleasure working with you toward reaching your financial goals! We deeply value the relationships we build here. As a company that is 100% referral-based, we're always looking for new opportunities to provide our services and ways to extend our reach.

We ❤️ referrals!

Who do you know that can benefit from financial planning services, insurance, or investment strategies? You may know someone with a significant life milestone, such as a new baby, recent graduation, a job change, or just acclimating to a new normal.

We will always take the time to consult with anyone you refer to us. Just send a quick introductory email connecting your referral with Yohance (yohance@moneyscriptwealth.com), and we will take it from there!

Thank you for your business, and we look forward to a continued partnership with you!

Request for a Referral (Medical)

It's a pleasure working with you toward reaching your financial goals! We deeply value the relationships we build here. As a company that works with individuals in the medical community, our best source for new clients is recommendations from our existing relationships.

We ❤️ referrals!

Who do you know that recently transitioned from residency to attending? Do you know any medical students embarking on residency and need help bridging the financial gap? What about existing nurses or physicians with a significant life milestone, such as a new baby, recent graduation, a job change, or just acclimating to a new normal?

We will always take the time to consult with anyone you refer to us. Just send a quick introductory email connecting your referral with Yohance (yohance@moneyscriptwealth.com), and we will take it from there!

Thank you for your business, and we look forward to a continued partnership with you!

Referral Received Email

Greetings {{Contact.Nickname || Contact.FirstName}}!

{REFERRAL'S NAME} speaks highly of you, and it is a pleasure to e-meet you. I'd love to find a convenient time to meet to discuss your finances.

Typically, introductory meetings are 15-30 minutes, depending on your questions. During our time together, we will discuss:

- Your financial dreams and goals
- Your level of financial literacy

- Your current financial reality
- The financial planning process
- How I am compensated as your advisor

By the end of our visit, we will know if we are a good fit for one another.

Please use the link below to schedule your complimentary Discovery Session. I look forward to talking to you soon!

Schedule your *Discovery Session*

{{Signature}}

First & Second Follow-up (one week later)

I hope all is well! This is a friendly reminder to schedule your complimentary Discovery Session with Yohance. Click on the link below to get started!

Schedule your *Discovery Session*

Third Follow-up (to Referee)

Thank you again for referring {Insert Prospective Client's Name Here} to Money Script Wealth Management!

I'm contacting you because {Insert Prospective Client's Name Here} has yet to schedule their complimentary Discovery Session with Yohance. They may not be receiving our emails. Spam blockers can be aggressive these days! If you think it would be easier to reach them by text or phone, please let us know the best number to contact them.

Thank You!

Final Attempt (add to drip marketing)

We've contacted you a few times, and it appears now is not the best time for you to focus on your financial planning. We have many great resources you can access, including our podcasts, newsletters, and blogs.

When you are ready to engage in the process, please schedule a Discovery Session via this link.