

## Company Letterhead

Dear Referral,

Marvin Feldman of Feldman Financial Group recently completed a financial planning project for our company. Based on the quality of the work he performed, you may find his services of value.

While I don't know if these services will fit into your planning, I would suggest Marvin meet with you and Kathryn to discuss the financial programs which may be appropriate for you and your company.

Marvin will call in a few days to set up a convenient time to meet. I would appreciate your taking his call.

Sincerely,

Business Owner