

## Prospecting : Sample Nominator Email

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*O. Alfred Granum, CLU states in his Building A Financial Services Clientele text that “we are in a prospecting and promotion business.” Prospecting alone – receiving a name, or even a qualified name – is only half of the job. Obtaining a strong introduction from the nominator is absolutely critical to your ability to actually secure a meeting with the prospect.*

*Your language must include a clear and concise explanation of how you will reach out to the referrals you’ve been given and what help you need from your nominator. Remember that your clients WANT to help you – but they aren’t always sure what to do. Providing them with a sample email that they can then forward to the referrals they gave you takes away the guesswork and expedites your process.*

*Here is one example:*

[Name of Referral],

I don’t know your financial situation – it’s none of my business. But I know you, and I know Jim Effner. He handles my financials. I like him. I trust him without question. And I know without a doubt that a meeting between the two of you would be beneficial. I gave him your name and number – he’s going to reach out to you. I know you’re busy. Like me – you may think you are all set (which I wasn’t). I hope you’ll take the opportunity to meet him. If nothing else, I know you’ll enjoy him.

[Signed by Nominator]