|  |
| --- |
| Company Name |
|  |

Date

[Name of Referred]
[Address]
[City, ST Zip]

Dear [Name of Referred],

My name is [advisor name] and [client who referred them] have probably mentioned to you that I am looking for the opinions of people such as yourself.

I am conducting a series of small focus group sessions of 10-12 people. Every person or couple will be paid $50 to give me their frank feedback. It will be one-hour long and held in my office conference room. You will simply fill out a survey telling me, on a scale of 1-5 in level of most important…to least important, how you feel each topic applies to household finances. You will also be asked if there is anything you feel should have been covered but was not.

I need people who are not currently my clients to ensure I get direct feedback from people not afraid to hurt my feelings.

I appreciate your consideration in attending this small focus group session. It will be exactly one-hour long. Snacks and beverages will be available.

If you have any questions, please give me or my [Assistant’s Name] a call at [Phone Number]. Otherwise, we will contact you.

Thanks again!

Your Name