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| --- |
| Company Name |
|  |

Date

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

Dear [Name],  
  
I hope this finds you well! Say, I am putting together a little program to give my practice a checkup and I was wondering if you could do me a favor? I cannot tell you how much I appreciate your trust in me and I want to continue to earn that trust. That is why I’m thinking about putting together a series of small focus groups so I can get opinions from people such as yourself. I hope to find out if the things I concentrate on with my clients are really wanted or needed by the public. And more importantly, to see if there are things that we are missing.

I want to make sure I get direct feedback from people not afraid to hurt my feelings, so I need people who are not currently my clients. I would like to put together small groups of about 10-12 people that would meet for about an hour to give me their feedback.

Here’s the good news! I’ll pay both you and them for the feedback! I’ll pay you $20 for each person you find to participate and $50 to the person or couple that actually participates. I feel this is very important information and am willing to pay for frank feedback.

These brief one-hour sessions will be held in my office and I’ll be serving snacks and beverages to keep people happy and talking! The participants will simply fill out a survey about a list of financial topics. The survey is on a scale of 1-5 in level of most important…to least important, as to their views on the topics, as they apply to household finances.

I’ll be using this information to better serve you and to make my practice more client friendly.

If you know anyone between the ages of 50 and 70 that would be willing to help out for an hour for $50, please give my office a call so that we can send them an invitation. It does not matter if they have current advisors as this is simply to get their opinions. (It might even help if they have current advisors because they can tell me anything, I’m missing for you!)

Thank you so much for your help with this! It really means a lot to me and I think it will help me serve you, and all my clients, better in the future.

Thanks again!  
  
[Your Name]