

Asking for Reviews:

Email Outreach Templates for Financial Advisors

Use the templates on the following two pages as a starting point to prepare your email asking clients and non-clients to write a review.

These resources are for informational purposes only with hopes of making your life a little easier as you prepare to get started with online reviews to grow your business. We encourage you to speak with your compliance team and legal counsel prior to using or customizing any of these resources.

Prefer this template in Microsoft Word format? Send an email to yourfriends@wealthtender.com, and we'll send it right over.

Wealthtender is the first financial advisor online review platform designed to be fully compliant with the SEC Marketing rule.

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Email Template 1: Current Clients

Subject (Suggestions): How are we doing? | How am I doing?

Hi [First Name],

I'm reaching out to you and each of my clients this morning to thank you for trusting me to help you achieve your financial goals. It's my pleasure serving you, and I appreciate you choosing me as your financial advisor.

I would be grateful if you could write a review about your experience working with me as a valued client of our firm. These reviews only take a couple of minutes and help other people looking for a financial advisor decide if we may be a good fit to work together.

Of course, writing a review is entirely optional, and I appreciate your consideration. Here's a link to my profile page on Wealthtender if you'd like to write a review when you have time:

<https://wealthtender.com/financial-advisors/your-name>

Simply scroll down and click 'Write a Review', and you'll see a form appear with easy-to-follow instructions.

Thanks again for your consideration, and please let me know if there's anything I can do for you today.

[Your Name]

Email Template 2: Non-Clients

Subject (Suggestions): Can I ask a quick favor? | Do you have two minutes?

Hi [First Name],

How are you doing?

I'm reaching out with a quick favor to ask. And it's completely optional, of course!

Regulators did not permit financial advisors to ask for online reviews until recently. This was unfortunate because online reviews help trust-based professionals establish a strong reputation (e.g., doctors and lawyers have been using online reviews for years).

Fortunately, the rules now permit me to ask for reviews from my clients and close contacts like you who know me well.

Would you be willing to write a review? Given the nature of our relationship [e.g. [volunteering together at _____](#) / [working together at _____](#) / [serving our community together at _____](#), etc.], I believe you can offer a unique perspective about my [[character](#) / [integrity](#) / [dedication to _____](#) / [knowledge of _____](#)] that could help people feel more informed when deciding if we're a good fit to work together.

These reviews only take a couple of minutes, and I'd be genuinely grateful for your help. Here's a link to my new profile page on Wealthtender if you'd like to write a review when you have time:

<https://wealthtender.com/financial-advisors/your-name>

Simply scroll down and click 'Write a Review', and you'll see a form appear with easy-to-follow instructions.

Thanks again for your consideration. I'd also be happy to return the favor if I can write a review for you or help you with anything otherwise.

[Your Name]