

# Review Aggregation:

## Email Outreach Template for Financial Advisors

Use the template on the following page to ask a client if you can republish the review they wrote on Google or Yelp on an SEC-compliant platform like Wealthtender or your own website.

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](mailto: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.**

[Learn More](#)



# Email Template: Review Aggregation

**Subject (Suggestion): Thanks & A Quick Question**

Hi [First Name],

I'm grateful for the recent review you wrote on [Google / Yelp] sharing your experience working with me.

Your review is truly appreciated and helps other people looking for a financial advisor decide if we may be a good fit to work together.

Would you mind if I republish your review on my [own website / profile page on Wealthtender]?

Thank you,

[Your Name]