

Use this letter when you need to REJECT a client who is messing you around...

The word will, hopefully, spread that you are not a pushover!

The fact is, no one likes being rejected – not even clients, and when the shoe is on the other foot, it also makes you feel good too!

By the way...we once had a lady who loved the concept of rejecting clients so much she went completely mad and started rejecting every client she could think of! Naturally, that's not the idea, even though it feels SO GOOD!

Rejection Letter - 1

Good morning Mr. Baker

I thought it would be helpful to explain the way I work. The reason I have so many delighted clients is because I do take them all seriously and am fully committed to helping them achieve their financial goals and dreams in the shortest time frame. A large proportion of them are now consistently enjoying financial security, opportunity of capital growth, and quite simply more money on their 'personal balance sheet'.

Unfortunately, since you have not made a decision to allow me to help you as new client, reluctantly I have to let you know that it will no longer be possible to consider working with you in the future. This is because consultancy time is very valuable - as I am sure you appreciate - and already we have spent **XX** hours together.

So I must simply wish you well and trust you will be able to find a financial adviser who you can work with on all the important areas of your life.

Best wishes

XYZ
ABC Company

P.S. If you wish to discuss this, I would be willing to have a brief conversation over the phone – but will leave this entirely up to you. Every future success.

This second letter is to be used when they reject you first

Rejection Letter – 2

Good morning Mr. Wade

Thank you for being so honest about not wishing to work together. This is, in fact, very helpful and you may be surprised to know – very welcome news under the circumstances.

Please don't take this personally, but there's definitely a 'chemistry requirement' between a financial adviser and their client when advice is needed which I did not detect between us. It exists with all my clients, and it helps to get them the results they achieve towards financial security, capital growth and quite simply more money on their *personal balance sheet*.

I am very committed to helping clients become wealthier and more financially stable as quickly as possible, yet if there is no working relationship in the first place – the chemistry- this outcome is simply not going to happen. Over the years I have realised that it's based on trust and an open-mindedness that is sometimes difficult for some clients to buy into.

So please don't worry. I am sure you will find the right adviser for you, and I wish you every success for the future.

XYZ
ABC Company.

P.S. If you wish to discuss this, I would be willing to have a brief conversation over the phone – but will leave this entirely up to you. All the best.