

John Smith, CPA

Address • New York, NY • Zip code

Phone: (XXX) XXX-XXXX • E-Mail: XXX@XXX.com

DATE

[Recipient]

[Title]

[Company]

[Address 1]

[Address 2]

[Address 3]

Dear [Recipient]:

I am an experienced financial advisor and CPA writing to express interest in the Financial Analyst position in your group. I currently work as a Financial Advisor with the Private Client Group of Merrill Lynch in Manhattan, analyzing client needs and designing custom investment packages for high net worth individuals.

I have extensive expertise in client relationship management through my work on this team, which handles over 100 clients with an average net worth of \$5-10 million. In guiding the financial planning of these clients, I have gained particular skill in areas including:

- In-depth client profiling
- Creative and extensive needs analysis
- Liabilities management
- Tax planning
- Insurance investments
- Working closely with clients and related planning professionals

I believe that my extensive and diverse experience in these areas, as well as my knowledge of the particular considerations of working with high net worth clients, make me an excellent candidate for your firm. Please feel free to contact me via the phone number or email address listed above at any convenient time. I look forward to speaking with you further about this intriguing opportunity.

Sincerely,

John Smith, CPA