### TIPS: Before You Send the Email…

*Use this template to get your email started. Always customize the email for the unique organization you’re reaching out to. For example, if it’s a local food bank, you’ll choose different words than if it’s a tax preparer.*

*Once you’ve filled in all the fields, read it a few times to ensure it sounds clear and professional. If you change a few words to sound more like you, that’s fine, too — just make sure all of the main points in the template are covered.*

### INSTRUCTIONS

*Copy and paste the* ***Subject Line*** *text into the email’s subject line. If you’re using an email platform like MailChimp, you can also past the* ***Preview Text*** *in the preview text field so it will appear next to the subject line in recipients' inboxes. Finally, copy and paste the* ***Email Body Copy*** *into the body of your email.*

{SUBJECT LINE}

**RE: Our local partnership to grow and reach more people!**

{PREVIEW TEXT}

Let’s talk about how we can work together.

{EMAIL BODY COPY}

A group of women sitting in a room

AI-generated content may be incorrect.

Dear {Potential Partner Name},

Ever wondered how many more people you could reach with a marketing partner who gets your audience?

My name is {YOUR NAME}, and I’m an insurance agent in your area. I offer {PRODUCT TYPES}, along with guidance and support to my clients. I’m looking for organizations in my area to work with in a relationship where we both benefit. As I searched for organizations, you immediately caught my eye as a great potential partner because of our {overlapping/complementary} target demographic and how we both show up in our community.

I would love to get together in person and talk about what a partnership might look like and

how your {clientele/customers} would benefit.

Let’s meet in the next week! Here’s when I’m available:

{Time & Day 1}

{Time & Day 2}

{Time & Day 3}

I look forward to our conversation!

Sincerely,

{Your name}

{Your contact information}

### FOLLOW-UP TIPS: *After You Send the Email*

*After you’ve reached out to your potential affinity partner, there’s still more you can do!*

* *Always know when your calendar has availability so you can commit to a meeting time when they get back to you.*
* *Follow up in about a week with another email — or a phone call.*
* *If you don’t hear back after a few tries, you can stop by in person, or let them go — if it’s not a fit, it’s OK!*