

[Your Name]  
[Your Address]  
[City, State, Zip Code]  
[Email Address]  
[Phone Number]  
[Date]  
[Recipient's Name]  
[Recipient's Title]  
[Company/Organization Name]  
[Company Address]  
[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. My name is [Your Name], and I am a [Your Current Job Title/Status, e.g., CFA Level II Candidate] with a passion for [specific area of interest, e.g., investment management, financial analysis]. As someone who is aspiring to advance in the finance industry, I am reaching out to connect with experienced professionals like yourself.

I recently came across your profile while researching leaders in the CFA community and was impressed by your work at [Recipient's Company/Organization] and your contributions to [specific project, initiative, or area of expertise].

I am particularly interested in learning more about [specific topic related to their expertise], and I believe your insights would be invaluable as I navigate my career path. If you have some time in the coming weeks, I would greatly appreciate the opportunity to connect, whether through a brief phone call or a coffee chat, to discuss your experiences and any advice you may have for someone in my position. Thank you for considering my request. I look forward to the possibility of connecting with you.

Warm regards,

[Your Name]

[LinkedIn Profile or Professional Website, if applicable]