

FOR REFERRAL SOURCES

# What you can share before conflicts are cleared.

*A one-page reference for advisors preparing a confidential referral.*

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## What is the best way to introduce a client?

The simplest way is to give your client my office's contact information and let them reach out directly. If your client would like you to make the introduction, email my office with the subject line "Confidential Referral," and include only your client's name, your relationship to them, and the general nature of the concern.

### Share now

- Your client's name
- Your relationship to them
- The general nature of the concern

### Hold until conflicts are cleared

- Financial statements
- Emails
- Other details

## Why it matters

Please do not forward financial statements, emails, or other details yet. My office first has to confirm there is no conflict of interest, and until an engagement is in place, the less that travels by email, the better for your client. From there, Erin Feldman in my office will reach out to your client quietly and arrange a first conversation.

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## Make a discreet introduction.

Erin Feldman, Legal Assistant and Intake  
emfeldman@beermannlaw.com  
Subject line: "Confidential Referral"

Please do not send confidential or time-sensitive information before conflicts are cleared and an attorney-client relationship is established. Representation is subject to formal engagement procedures.

Contacting Beth's office does not create an attorney-client relationship. Representation is subject to conflicts checks and formal engagement procedures.

These answers are general information for referring professionals and are not legal advice.