

HOW IT'S DONE



Sample Ideal Client Profile

We have a vision of exactly how we want to grow our business. We want our clients to experience tremendous success, to be so excited about what we have helped them achieve that they feel compelled to introduce us to their relatives, friends, co-workers and other like-minded people.

Our ideal client, like you...

- ✓ Is committed to and invested in the promises he/she made to his/her family and business associates.
- ✓ Makes family and community a priority.
- ✓ Has a history of seeking and implementing the advice of experts.
- ✓ Is goal focused; has a strong vision, at least in his/her mind, of where he/she wants to go.

Who can you introduce us to, who...

- ✓ **Has in excess of \$250,000 of investible assets, or an income over \$150,000 per year.** If they're making anything less than this, they're won't 'get' our fee structure.
- ✓ **Is married with children.** They need to have 'lived' a little to understand parenthood, marriage, responsibility and accountability. We are looking for people who can appreciate and understand process.
- ✓ **Has worked with financial advisors in the past.** If they haven't already worked with someone, it will take more time for them to appreciate what we do and how we are different from everyone they have previously worked with.

We also form partnerships with other professionals and help them expand their business. Who can you introduce me to, who...

- ✓ **Is a successful professional** (attorney, accountant, mortgage banker, real estate agent, business owner) who has a good reputation for helping others.
- ✓ **Is influential and involved in a professional, charitable or community organization.** People in these positions can be good client prospects, or potential centers of influence.

Please list the names, telephone numbers and email addresses of friends, relatives or business associates who fit the above descriptions and to whom you would like to introduce me. I will handle your referrals and introductions in the same discreet and professional manner that you enjoy.

Thank you for taking the time to help others reach their financial goals.

	Name	Telephone	Email
1.			
2.			
3.			
4.			

Referred by: _____ Telephone: _____