

# Favorable Introduction Conversation

**YOU**

**FAMILY**

**EXTENDED FAMILY**

**WORK**

**SOCIAL**

Each category includes a list of three empty boxes with a '+' sign for notes.



(Key Words are Enlarged)

(Member's name), **thank you** for the opportunity to work together and congratulations on (starting your financial plan, etc.). What did you find **most valuable** about this process?

I'm glad you're happy with our process and results. We've found the reason most people don't make financial plans is they simply **haven't taken time, or found someone they trust.**

Now, there's one thing I need **your help** with. Could we take just a few minutes to **think of people you care about** who could benefit from this same process?"



With these groups in mind, who do you think could benefit from talking with me?

## Let's start with your immediate family...

(Proceed through each group)





Thank you, (Member's name), for suggesting these people to me. Before I contact them, **I would appreciate if you could let them know I will be calling.** With your introduction, they'll be **expecting my call.**

I'd like to follow up with these people within a few days. **When do you think you could reach out to them?**

**Thanks again** for trusting me. I promise that I will treat your friends and family with the **same level of respect and professionalism** I have shown you.