

Warm Introductions are Greatly Appreciated

Clients who are happy with our services usually have friends, family, or acquaintances that are similar to themselves. We are asking you to assist us in helping your friends and acquaintances – **importantly not out of obligation to us, but rather so that they might benefit from the advice, education, and service we can provide to them.**

What is a Warm Introduction?

- Someone who you will call first to obtain permission for us to speak to them.
- Someone who will give you a cell number, work number and an email address so that we may contact them during business hours.

Please do not tell them about our programs and how they might benefit them – please let us do that. Remember that this is about financial stewardship and education. It reaps lasting rewards when we help someone achieve their goals.

Here is what you should say:

“Ram and Usha, I would appreciate you doing me a personal favor. I would ask that you take a telephone call from Atul Dubal. We hired him as our Personal Financial Coach and advisor. He is a great guy, very knowledgeable, and not a pushy salesman. Atul has helped us put our financial goals in perspective and helped us put together a path to achieve them, including some things we were not aware of.. As a favor to me, would you please accept a 15-minute call from him? If you want to talk further that is up to you, but I am positive that it will be worth your time.”

Possible Responses: *“What is he going to talk about? I already have a financial planner. I’m too busy. Not interested. Don’t want to invest any more money. I’m not buying anything,” Etc.*

Your response / questions: *“You know, I’m not a financial pro and I cannot tell you everything Atul has told me, but he can answer your questions. I will guarantee that not only would you be doing me a favor by taking his call, If he is able to help your family or introduce you to something you have not seen before, I’ll be doing YOU a favor. Listen to him for 15 minutes, that is all I am asking. You are under no obligation. You are open to a second opinion aren’t you? Would a call at work or home be best?”*

Your response to whatever they say: *“That’s OK. All I need you to do is take a call.”*

Who do you know who is between age 45 and 65 who....

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| • Works with you. | • Wants to retire early and wealthy. |
| • Works for you. | • Has had a recent job promotion. |
| • Is serious about their money. | • Has grandchildren. |
| • Owns a business. | • Is involved in charity work. |
| • Planning to sell a business. | • Is ambitious. |
| • Recently sold a business. | • Has a new child. |
| • Has RSU/company stock. | • Has children. |
| • Are a professional couple. | • Will have future college expenses. |

Name:

Address:

Cell Phone:

Work Phone:

Home Phone:

Best time to call: Morning Afternoon

Relationship to you:

Employed Business Owner Retired Children at Home Married OK to Call

Name:

Address:

Cell Phone:

Work Phone:

Home Phone:

Best time to call: Morning Afternoon

Relationship to you:

Employed Business Owner Retired Children at Home Married OK to Call

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