

Here to Help You, Help Others

As a client of ours, you are in a unique position to introduce others to us, so that they too might benefit from our financial planning and investment management solutions.

We are here to help you assist family members, friends or associates who:

- Want to experience continued financial success
- Want the guidance of a financial professional
- Willfully participate in financial planning for their future success
- Share your attitude, lifestyle and level of wealth accumulation

How to Help Someone You Know

If you are talking with someone who needs guidance with financial planning and investment management or is going through a critical financial event and unsure of what to do, let them know we are here to help them.

Step 1

You may want to explain how you have benefited from working with us – in other words, explain the services and solutions you personally value and appreciate.

Step 2

If based on your discussion, they would like to be introduced to us you can easily do so in one of two ways. One option is for you to call me and provide me with their name and preferred contact number (always with their expressed permission to do so). The other is to provide them with our contact information and they can contact us at their convenience.

Step 3

Provide them with a brief overview of what to expect. Our first call would be a brief introduction to each other and we would invite them to an initial meeting. We will also provide them with our Introduction Kit, like the one you received. As you know, our initial meeting is to determine if we are a good fit for working together based on the service we provide and the ones they are looking for.

Many of our clients feel more like an extended family and we take great pride in taking care of them. If the situation arises, we will gladly help you take care of yours...here to help you help others.