

3 Superb Introductions

Read and understand the following.

My mission is to serve entrepreneurial-type individuals by helping them accumulate wealth, reduce their taxes, maximize family security, and create a more favorable financial future for themselves, their families and their businesses. My expertise is my ability to match insurance and investment strategies and techniques to the specialized needs of the entrepreneur. My services are designed to provide an opportunity for clients to take a step back from the tree in order to see the forest, focus on first things first, and create action oriented strategies to help achieve their most important lifetime financial goals. It is in this way that I help my clients keep together what they're spending their lives putting together.

Please take a minute to jot down three friends that fit the above profile whom you care the most about. My experience has shown that such people almost always have a need for my services, and they appreciate another's concern that allowed us to meet. I look forward to being of benefit to you again in the future and establishing many similar productive relationships with those people you care the most about.

Introducer

Date

Name:	Home Phone:	
Address:	Work Phone:	
Occupations:	Marital Status:	Children?

Name:	Home Phone:	
Address:	Work Phone:	
Occupations:	Marital Status:	Children?

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