Help Us, Helping Others

Referring Client Name: _____ Date: _____

Name	Phone Number	*C / R	Relationship

*** C – Client or R – Representative**

Who do you know that:

- Genuinely cares about their finances?
- Needs to make more money?
- Makes really good money?
- Needs to get out of debt?
- Is close to or recently retired?
- May never retire?
- Would want to protect their assets from loss?
- Would like to learn about finances?
- May need to lower their tax liabilities?
- Owns a business?
- Recently graduated college?
- Was recently laid off?
- Is dissatisfied with their current job?
- May be open to a part-time income?

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