

# Referral Profile Form

## Brian Fons

### Who to Look For:

- Attorneys and Paralegals in Law Firms
- In-house counsel and Corporate Counsel
- CFO's of Multi-state companies
- Estate planning attorneys

### What to Listen for:

- Registered Agent services
- Corporate Compliance
- Formation of businesses

### Ideal Prospect Description:

- Corporate department staff
  - Law firm
  - In House counsel
- Works in multiple states either for company or client

### What to say to that Prospect:

- I have a service company that can assist with keeping your company in good standing and in compliance with annual filing requirements.
- There is an efficient and reliable way to outsource those services.

### Strategic Alliances:

- Attorneys – Estate planning, real estate, "General corporate"
- CPAs
- Banks
- Real Estate investors
- Private equity investors