

# Referral Profile Form

## Margaret Brennan, CFP

### Who to Look For:

- People with money
- People in transition
- People new to the area
- People 40+ years old

### What to Listen for:

- They're unhappy with their current broker
- They're talking about retiring soon
- They'll be receiving a lump sum payment
- They were laid off recently
- Worried about finances

### Ideal Prospect Description:

- 40+ years old
- Investible assets <\$250,000
- Wants help with their investments
- Needs a thorough review of their financial situation

### What to say to that Prospect:

- I know a financial advisor who may be able to help you, can I have Margaret give you a call?

### Strategic Alliances:

- Attorneys
- CPAs
- Real Estate Agents
- Hairdresser/personal service providers