

STEVE WEINER, CPA

REFERRAL PROFILE FORM

Who to Look For:

- Business Owners
- High Net-Worth Individuals
- Real Estate Owners
- Restaurant/Bar Owners
- Entrepreneurs
- Small Business

What to Listen for:

- I just started a business and I need an accountant
- I just bought I house and I heard I get to write it off
- I always wait until April 15 to file my taxes
- I wish I could get a bigger refund
- I would like to understand my finances

Dream Prospect Description:

- Business Owner
- Financial Reporting Requirements (i.e. investors or bank loans)
- Requires Tax Planning

Ideal Prospect Description

- Entrepreneurs and Small Businesses
- Individual and/or family tax filing needs
- Bookkeeping and/or accounting needs

What to say to that Prospect:

- “Have you talked to a CPA about your needs?”
- “I can put you in touch with Steve Weiner, who can help you with your questions?”
- “Is it all right if I pass along your info to a contact of mine who has expertise in this area?”
- “Have you considered using an accountant?”

Strategic Alliances:

- Lincoln Park Network Members
- Attorney’s
- Financial Advisors
- High-Net Worth Individuals
- Business Owners