

# REFERRAL PROFILE FORM FOR CHRIS MATERN

## Who to Look For:

- Business Owners
- Buyers or Sellers of Real Estate
- Commercial Property Owners
- High Net Worth Individuals who need an estate plan or update of an existing plan
- People who are considering personal bankruptcy
- Condo Associations

## What to Listen for:

- Complaints or concerns about legal challenges
- Thinking about buying or selling real estate (either commercial and residential)
- Mention that they need either a Will or a Trust
- Want to lease property (either as a landlord or tenant)
- Need help with contracts
- A condo association that needs either general help or collection of assessments
- Are going to be acting as an executor and need help probating the estate
- Cook County Property Taxes that are too high

## Ideal Prospect Description:

- Business Owner
- Commercial Property Owner
- A couple who has children, but doesn't have an Estate Plan

## What to say to that Prospect:

- Do you have an attorney?
- Do you have trouble getting the attorney to call you back?
- Does your attorney take a long time to get your work completed?
- Is the bill from your attorney an unpleasant surprise?
- Are you looking for an attorney that is prompt and cost effective?

## Strategic Alliances:

- Accountants
- Real Estate Brokers
- Business Consultants
- Divorce Attorneys