

NAVIGATOR

Personal Referral Plan

PHIL WHITE, MACKINAW & COMPANY

Introduction Opportunities

- ☑ Client Ambassador Programs
- ☑ Client Conversations
- ☑ Client Events
- ☑ Digital (blogs, emails, social media, etc.)
- ☑ Influencer Development
- ☑ Weekend Reading Email Program

Brag, It's OK

MACKINAW & COMPANY has a great story to tell. Be proud, share it.

"What separates us from other firms is we ONLY WORK WITH SMALL BUSINESS OWNERS. As a result our clients receive OUR EXPERTISE IN SMALL BUSINESSES."

Reminder

1. Comfortably share memorable stories about who benefits from the help you specialize in.
2. Then explain what to do when someone has an introduction.

Memorable Stories

Hi PHIL, let's turn referrals into introductions.

Often clients & influencers are confused. They're unsure if you want new clients, who you prefer to help, and can't easily explain what it is you do.

Share this when meeting with a client or influencer.

"Did you know that COMPREHENSIVE FINANCIAL PLANNING is a specialty of MACKINAW & COMPANY? It gives us an edge. Prospective clients such as SMALL BUSINESS OWNERS find this expertise to be productive and useful."

Faster Connections

Most referrals end before potential clients connect with the financial advisor they were referred to.

Use these to let clients and influencers know what to do when they have someone to introduce you to.

1. Sunny days are better with friends at your side. Would you care to [introduce us?](#)
2. Helping hands is what friendship is all about. Do you know someone who needs us? Call me at 906.555.1212 to set up an introduction.
3. Who do you know that [could benefit](#) from a little added security?
4. When a friend is caught in the rain, you hand them an umbrella. Does someone you know need help? Call me at 906.555.1212 to set up an introduction.

NAVIGATOR

Faster Connections (continued)

5. If you could open your door to a friend, [would you do it?](#) We'd love to talk with them.
6. Care to introduce us to a friend? [Pass over a note.](#) Call me at 906.555.1212 to set up an introduction.
7. Life is a beach when you aren't worried about money. Do you know someone [we could help?](#)
8. In a world of uncertainty, you can count on us. Is there someone you know that we can help?
9. We provide stability in a volatile world. A simple introduction can help. Call me at 906.555.1212 to set up an introduction.
10. The right introduction can bring peace of mind. [Here's a quick way to begin.](#)
11. Don't let your friends navigate this market alone. Would you be [kind enough to introduce us?](#) Call me at 906.555.1212.
12. Saving for retirement doesn't have to be something done alone. Introduce us to someone [who could use the help.](#)
13. Friends don't let friends go broke in retirement. Introduce us to someone [who could use the help.](#)
14. Experience a secure future together. [Introduce us to someone](#) in your circle today!
15. An introduction can change a life. Do you know someone who needs us? Call me at 906.555.1212 to set up an introduction.
16. If anyone in your network can use our services, [please let us know by dropping a note!](#)
17. Saving for retirement is daunting. Do you know someone who could use a hand? Call me at 906.555.1212 to set up an introduction.
18. An introduction shows that you care. Can someone in your network use financial guidance? [Let's get them some help.](#)
19. One simple introduction can be powerful. Show someone you care. Call me at 906.555.1212 to set up an introduction.
20. Do you know someone who could use some help with their retirement goals? [Let's set up an introduction.](#)