

# Client Advocate Program

*Who qualifies for the Client Advocate Program?*

*Any client who refers us to a friend, family member, or colleague who may be suitable for our Services.*

*These people may benefit from your services:*

Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_

Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_

Name: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Address: \_\_\_\_\_  
Email: \_\_\_\_\_

*Referred By:* \_\_\_\_\_

**Our client profile includes the following:**

- Is changing jobs, is approaching retirement or is retired.
- Has the potential to invest over \$250,000 or more with our firm.
- Is financially conservative and family-oriented.
- Is genuinely a nice person who needs and wants our help!

*Thank you for your support!*