

# LIVING AND GROWING BY REFERRAL

**Start with your WHY.** If you do what you do to empower more families financially, why would you limit that to only people you don't know? Your why and your relationships will lift your business success and allow you to have balance in life that feeds you - financially, emotionally, professionally and personally.

**My WHY should be shared with everyone I know. My WHY is:**

---

---

---

---

Based on my relationships in every aspect of my life, I will nurture those relationships by using the power of 3 - **Contact, Care, and Community:**

- Write 3 check-in emails daily.
- Make 1-3 "no reason" phone calls daily.
- Send 1-2 handwritten notes daily.
- Pop in and say "hi" - bring something that says you care.

When you live and grow by referral, and develop balance in your life through the relationships you care about, you:

- Gain more energy and feel rewarded.
- Connect to the "right" clients - the ones you love.
- Create more time and balance in your life.
- Grow your business through rewarding relationships.

- ★ Educate your relationships in every area of your life on how the financial advisory industry works.
- ★ Educate how you work, who your ideal clients are, and why you enjoy working with them.
- ★ Educate on the value you bring to your clients and why it is important to you.

**"THE MOST EFFECTIVE WAY TO DO IT IS TO DO IT." - AMELIA EARHART**

# "EVERY BUSINESS IS BUILT ON FRIENDSHIP." - J.C. PENNEY

We often dismiss areas of our lives that can feed our business funnel. Our truest relationships - the ones that we nurture on a regular basis - are those that authentically support our goals and objectives. List 5 people in each of the areas below and add them to your business contact list. GRADE EACH: A+ (ALREADY SEND MULTIPLE REFERRALS); A (MOST LIKELY TO REFER); B (WOULD IF THEY KNEW HOW); C (MIGHT REFER IN THE FUTURE).

## FAMILY


## PERSONAL DEVELOPMENT


## FUN AND RECREATION


## GIVING AND CHARITY


## FRIENDS


## SPIRITUAL AND COMMUNITY
