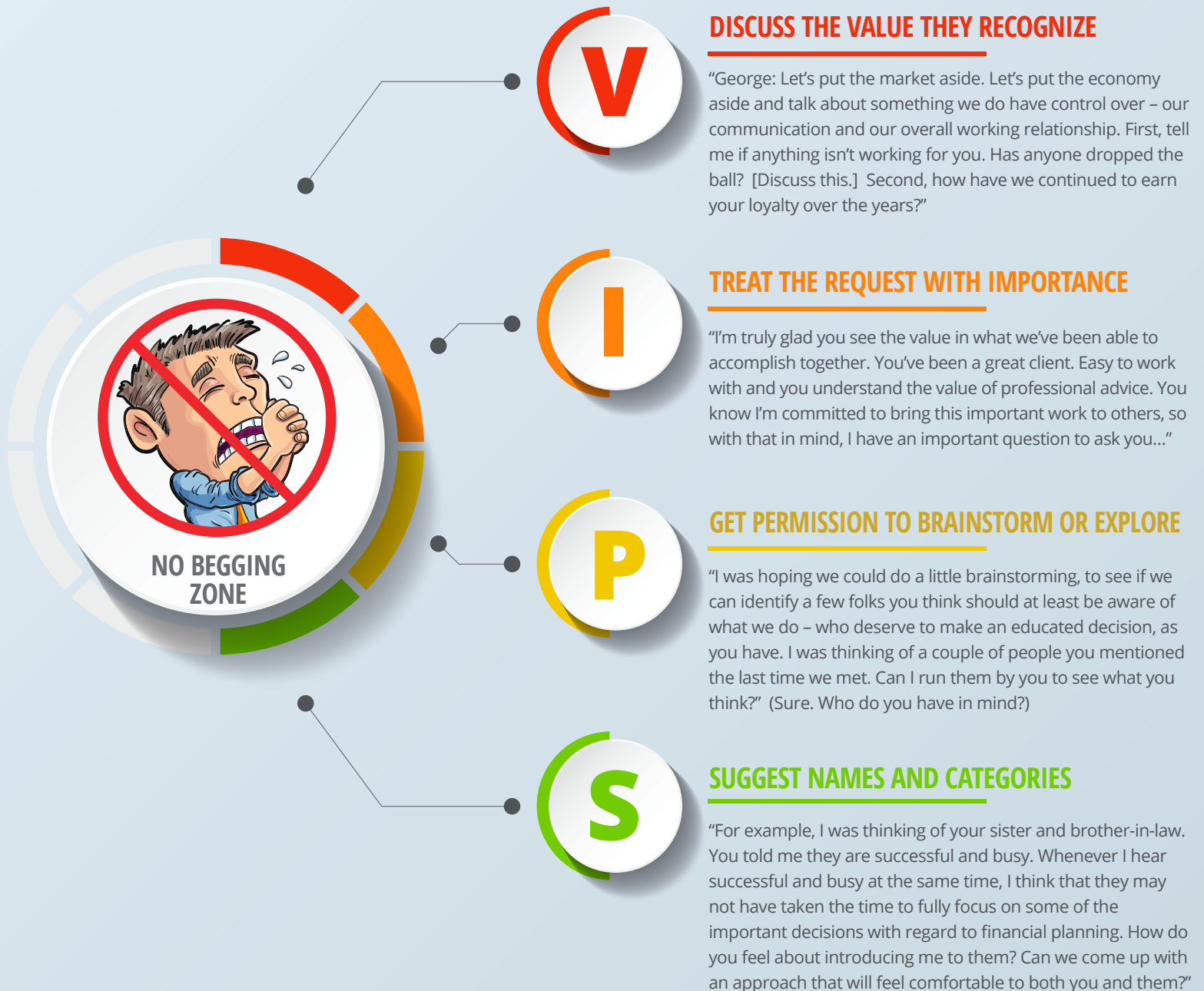


# V.I.P.S. METHOD

## FOR ASKING FOR REFERRALS™

The V.I.P.S. Method for Asking for Referrals has been tested and used by professionals for over two decades. If applied consistently and with confidence, it will generate great referrals for you without feeling like you're pushing or begging. You may wish to adjust the sample verbiage I've provided to ensure you feel natural and genuine. With that said, I strongly urge you not to deviate from the basic V.I.P.S. formula. Each step has a specific purpose. Deviate at your own risk. (Kidding... Sort of.)



### DISCUSS THE VALUE THEY RECOGNIZE

"George: Let's put the market aside. Let's put the economy aside and talk about something we do have control over – our communication and our overall working relationship. First, tell me if anything isn't working for you. Has anyone dropped the ball? [Discuss this.] Second, how have we continued to earn your loyalty over the years?"

### TREAT THE REQUEST WITH IMPORTANCE

"I'm truly glad you see the value in what we've been able to accomplish together. You've been a great client. Easy to work with and you understand the value of professional advice. You know I'm committed to bring this important work to others, so with that in mind, I have an important question to ask you..."

### GET PERMISSION TO BRAINSTORM OR EXPLORE

"I was hoping we could do a little brainstorming, to see if we can identify a few folks you think should at least be aware of what we do – who deserve to make an educated decision, as you have. I was thinking of a couple of people you mentioned the last time we met. Can I run them by you to see what you think?" (Sure. Who do you have in mind?)

### SUGGEST NAMES AND CATEGORIES

"For example, I was thinking of your sister and brother-in-law. You told me they are successful and busy. Whenever I hear successful and busy at the same time, I think that they may not have taken the time to fully focus on some of the important decisions with regard to financial planning. How do you feel about introducing me to them? Can we come up with an approach that will feel comfortable to both you and them?"