

# PREFERRAL SCRIPTS

These simple conversations can help soften the ground before you actually come out and ask for referrals. Try them today!

## NO REFERRALS

If your client is not giving you referrals yet, you can say something similar to the following (feel free to make it your own):

“You have probably noticed that I don’t often ask you for introductions. That’s because my primary concern has always been you. At the same time, given all of the turmoil over the last few years, I see some things that concern me. People take inappropriate risks for the return that they are expecting, and they compartmentalize their investments. They do not know how or if their investments are helping them reach their goals. For these reasons, if there is anyone that you care about, that could benefit from a second set of eyes I would be glad to help them.”

## FEW REFERRALS

If your client has given you a few referrals, but it has been a while, you can say something similar to this (feel free to make it your own):

“I want to thank you for referring me to (insert names from the past). You have probably noticed that I don’t often ask you for introductions. That’s because my primary concern has always been you. At the same time, given all of the turmoil over the last few years, I see some things that concern me. People take inappropriate risks for the return that they are expecting, and they compartmentalize their investments. They do not know how or if their investments are helping them reach their goals. For these reasons, I would like to thank you for the referrals you have given me in the past and was wondering if there is someone else that you know of that would benefit from a second set of eyes. I would be glad to help them.”