

A SIMPLE STRATEGY FOR MAXIMIZING YOUR BUSINESS

BRIAN GALLERY

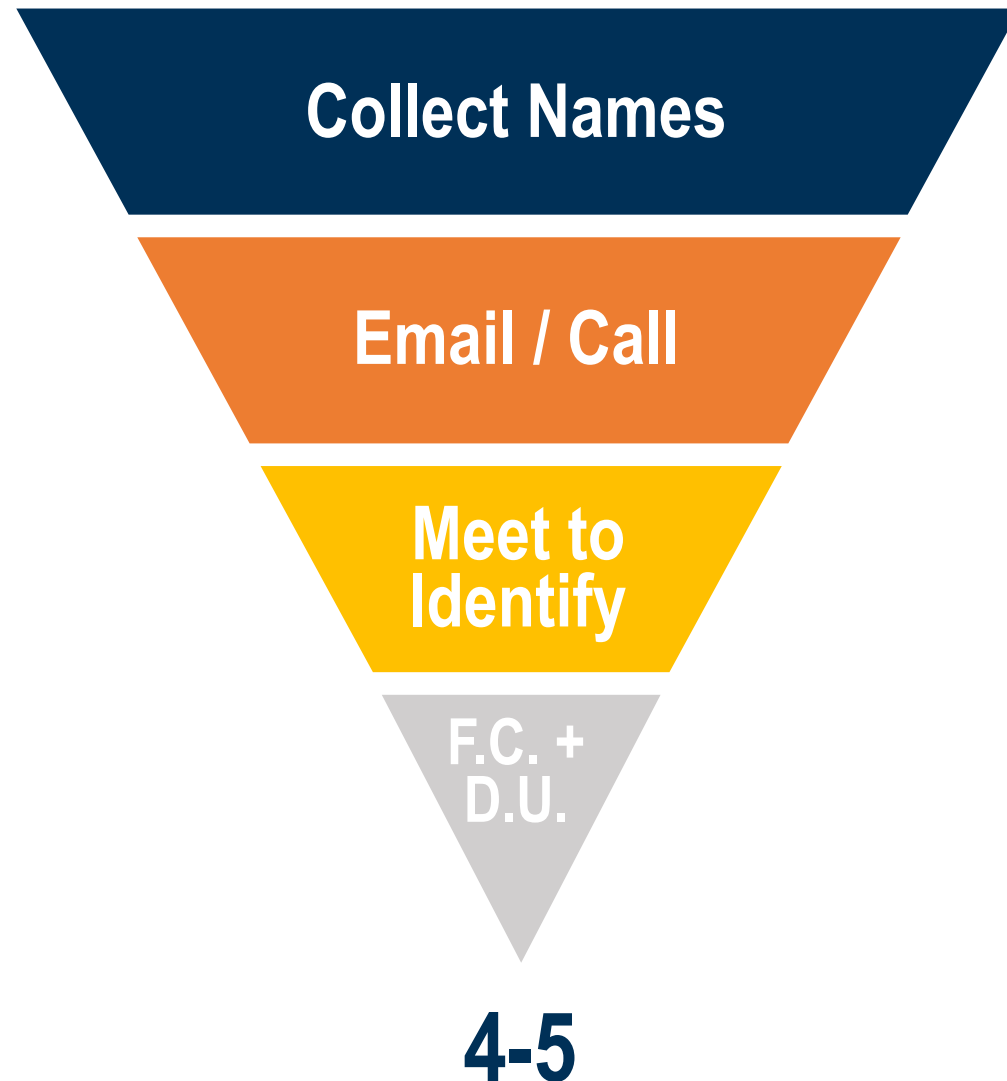
SENIOR VICE PRESIDENT

HEAD OF STRATEGY & CONSULTING

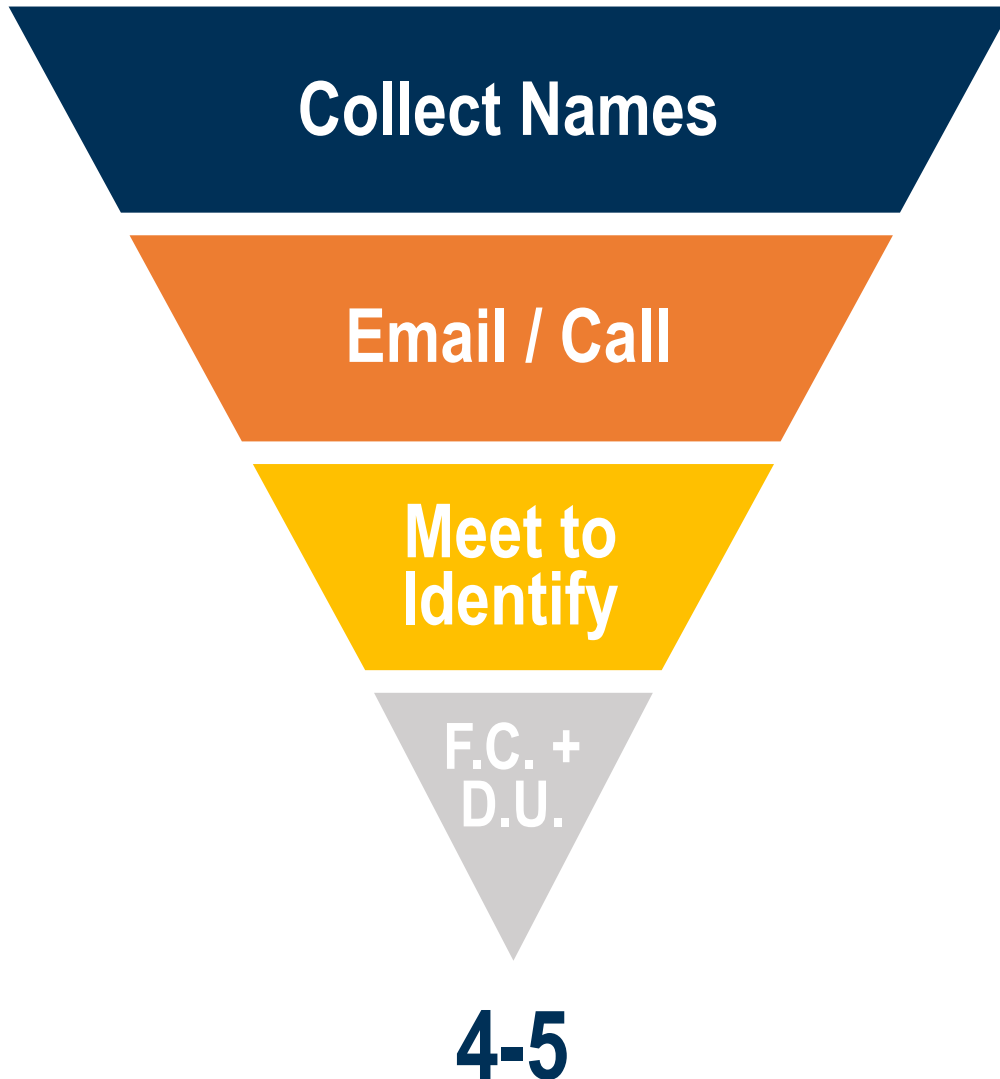
Financial professionals are reminded to check with their Compliance department for guidance on relevant regulatory restrictions and internal company policies.



A FOUR STEP PROCESS



ADDITIONAL BENEFITS AND OPPORTUNITIES



- Enhances client satisfaction
- Uncovers opportunities to refer
- Protects client base
- Expands your universe of professionals

GREATEST HUMAN NEED: A DOUBLE-EDGED SWORD

“Extremely helpful”

“Plan to take action”

Capture Names

