

**Referring a new client?** Have them sign up to receive a complimentary copy of the book "Values Based Financial Planning" by Bill Bachrach

Which includes the "Financial Road Map for living life on Purpose" worksheet.

Possibly the most motivating, life changing call to action that they have ever experienced.

### **The gift of a trusted referral**

What is a trusted referral, It is an opportunity to dialogue with someone who has trust and integrity earned through a successful relationship in both good and difficult times. Invaluable experience solving problems with knowledge and creativity. These skills are acquired through years of real life problem solving, in a chosen field of expertise.

As an advisor I have seen how my clients goals, resolve and ability to make informed decisions affect their success and/or failures. Good advice brings perspective, confidence and direction. Scheduled meetings and **regular contact** ensures that plans stay on track.

I am proud to say that I have assembled an incredibly effective and knowledgeable support team to assist my clients in making most important decisions regarding their financial lifestyle needs and goals.

### **What do our clients have in common?**

- *Our clients know what they want to achieve financially.*
- *Our clients appreciate expertise, premium service and financial discipline in the investment process.*
- *Our clients see the benefits of delegating financial matters to financial professionals.*
- *Our clients care for their families and their communities.*
- *Our clients enjoy life and we work to enhance the experience!*

### **In these challenging financial times weaknesses become most evident.**

I encourage you to share my "[Sleep well](#)" checklist with your important relationships, if they feel that they need a financial review. This checklist will quickly identify problem areas that I can assist them with.

### **Your referrals play a most important role in the growth of my practice in two ways.**

They permit me to focus on solutions to your financial needs without the distraction of marketing and they provide introductions to people with the same values of trust and integrity that brought us together.

To complete the referral process simply forward your referrals' contact info and brief introduction to us and we will contact them within twenty-four hours to begin the introduction process.

I look forward to the opportunity to help your loved ones improve their financial lives.

Most sincerely,  
Jeff Wachman B.Comm, R.F.P  
Senior Financial Planning Advisor  
Assante Financial Management Ltd.