



As a Financial Representative, developing close relationships with my clients and their families is of the utmost importance.

By assisting my clients to achieve a greater understanding of their finances today, I hope to positively impact their future, and the future of their loved ones for generations to come. Navigating through financial concerns such as short- and long-term planning, investments, and retirement savings, then helping my clients to be in a better position is extremely rewarding.

Regardless of age, marital status, income, or financial situation everyone can benefit from some sort of financial planning. Referring me to your friends, families, and colleagues is a real complement. By providing relevant information, you could help them take steps to care for their families' financial future.

You might ask ... "How will you approach the people I refer to you?" Our process is to first send a letter introducing VantagePointe Financial Group, and me, personally. Next they will be contacted by telephone to determine if they might have just 15 minutes of time so that I might share our process for helping people.

Please help me by providing answers to the following questions:

**LIFE CHANGES...**

- Who do you know who has recently gotten married/divorced?  
\_\_\_\_\_
- Who do you know who has recently had a baby or added to their family through adoption?  
\_\_\_\_\_
- Who do you know who has recently lost a loved one?  
\_\_\_\_\_
- Who do you know who has recently graduated college?  
\_\_\_\_\_
- Who do you know who has recently bought/sold a home?  
\_\_\_\_\_
- Who do you know that is caring for, or coordinating care, for an aging parent?  
\_\_\_\_\_

**OTHER...**

- Who do you know that may be dissatisfied with their current Financial Advisor?  
\_\_\_\_\_



**CAREER CHANGES...**

- Who do you know who has recently changed jobs or careers? Due to downsizing? Voluntarily?  
\_\_\_\_\_
- Who do you know who has recently started a business? What type of business?  
\_\_\_\_\_
- Who do you know who might have recently sold a business?  
\_\_\_\_\_
- Who do you know within your profession who might look to you for advice?  
\_\_\_\_\_
- Who do you know who is considering retirement, about to retire, or recently retired?  
\_\_\_\_\_

**PLEASE SIGN AND DATE**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



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