

5 Steps to the Referral Conversation:

1. Pull out the Linked In list in your in-person meeting
(Examples Below)
2. Go over the list with them (Example Script Below)
3. Go over others who are not on the list – Jog their memory
by listing off ideal Locations and Situations
4. Ask them who they want to be introduced to
5. Go over the introduction process – Explain how you want to
be introduced (Ideally over email)

Referral Asking Script:

After 15-20 minutes of rapport building/bonding/eating :)

Transition to Referral Asking:

I'm excited because I'm working on building my business this year. I love working with people just like you. I wish I had 10 clients and referrals partners just like you! I was thinking that maybe you could help me out with something real quick. (finish with voice tone down. Wait for a reply). I really like to work with clients and referral partners who friends of or connected to people I already work with.

When I was getting ready for this meeting, I actually hopped on your Linked In and saw that you're connected to a lot of people that I would love to be introduced to. So, I hope you don't mind, but I made a list of some people I'd love to be referred to. Some may be a good fit and others may not. (Hand them the list) / I actually just sent it to your inbox

Who is NOT a fit?

First off, who's not a good fit? Feel free to mark off anyone you don't really know, or your arch enemy..." :)

Who IS a good fit?

Who would be a good fit? I love working with referral partners who are responsive, passionate, energetic, well connected, loves networking and have a positive attitude. Who on this list fits that description?

Get the Golden Nugget

Great! What do respect or admire about them?

(Go down the whole list one by one. Write notes next to each one or have them write the notes)

Who Else?

Great! This is so helpful. Who else isn't on this list but would be a good fit?

Who do you know who...

Who do you know at *LOCATION* who *SITUATION*?"

Thank you so much. This helps so much. Who else?

(The idea is to keep asking “who else” & give more memory joggers until they really can’t think of any more. Help them help you by asking clear questions to isolate faces and help them think of great specific referrals.)

Examples:

- Who do you know in (cities where you work) who is serious about growing their business?
- Who are impressive financial planners you like to work with in town?
- Who are your favorite CPA’s or Insurance brokers?
- Who has a good reputation or you see them all the time at networking groups?

Once you get all the names, then go back and ask about each one:

Get the Golden Nugget for the additional names

This is great! Thank you. I actually love to compliment people when I call them, so... What do you respect/admire/love about _____? OR What’s something funny or unique about them? Any inside jokes?

Buying Atmosphere

Yes, I love it because I just get to compliment the people I call. If they are interested in sitting down with me, great! And if not, it’s no big deal. At least I can offer them the chance to hear about what I do and I’d like to hear what they.

Switch to Help Them

Thank you so much for your help. Now I’d like to help you. Who do you want to get introduced to? (Brainstorm and give them names)

How to get Introduced

I’m so glad we were able to do this. What I’ve found to be best is I will send a quick introduction email to each of these and cc you. I would love if you can do the same for me. Thanks again, and I will keep you posted on how these goes.

Sarah Michaels Linked In Connections (Example 1)

Laura Fredrickson – Choice Lending Group

Javier Salas – American Financial Network

Kimberly Smith – TRI Pointe Connect

Jay Plaza – Gateway Mortgage

Chris Burns – Axia Home Loans

Laurence Beers – Banc Home Loan

Mario Vargas – PrimeLending

Chris Zichichi – Banc of California

Tom Lebron – Alterra Home Loans

Juan Contreras – Metropolitan Home Mortgage

Alexander Martin – Guaranteed Rate

Luis Palomo – Gateway Mortgage

Michelle Sherwood – SWBC Mortgage

Jose Vallejo – Security National Mortgage

Patrick Sell – Paramount Residential Mortgage

Enrique Rangel – Chase

Kara Young – Chase

Bernadette Vasquez – Chase

Jeff Wettstein – Angel Oak Home Loans

Jose Vasquez – Dignified Home Loans

Mead Wippo – Insurance Broker, Burns & Whitaker

Jack Brown (Example 2)

1. John Van Donge - Stifel Financial Corp.
2. John Vance - Vance Wealth
3. John Petrick - Perennial Financial Services
4. Brad Harris - Perennial Financial Services
5. Carolyn Kelly- Senior Vice President at Dreyfus Investments
6. Carlos Rodriguez- Newton Capital Management
7. Jim Collier - Regional Consultant - Wholesaler at Catalyst Mutual Funds
8. Michael Baldauf -Regional Partner at Catalyst Funds
9. Tyrone Montague - Managing Director at KPMG US
10. Brian Park- BH Properties
11. Pierre Movsessian- LPL Branch Manager at LPL Financial
12. Michael Hatch - The Sterling Group
13. Derek Chaffin- Branch Manager at Wells Fargo Advisors
14. John Grace - Securities America Financial Corp
15. John Clay - Senior Vice President, DA Davidson
16. John C. Lindsey - President/CEO at Lindsey & Lindsey Wealth Management
17. Alex Chalekian- Founder and CEO at Lake Avenue Financial
18. Abby Dinkins - Townsgate Wealth Management
19. Brian Gemimo - Silvercrest Asset Management

20. Tucker Grace - Goldman Sachs Asset Managemnt
21. Jonathan Morse - BYN Mellon (NYC)
22. Michael Theis - Dryfus (Seattle)

Edward Jones:

1. Kyle Lundberg -LA
2. Gaea Verneris - LA
3. Hugh Fisher - LA
4. Nicholas Pennino - LA
5. Gary Strangis - - LA
6. Jim Watts - SB
7. Sarai Anderson -SB
8. Bradford Dickson - LA
9. Jeanie Alessandrini -LA

Ameriprise:

1. Kyle Nakano
2. Gary Kelman
3. James Spach
4. Ruben Segovia
5. Vedran Kaluderovic
6. Brent Rupnow
7. Dan Bowman
8. Erika Puzik