Grow your practice through referrals

Habits of highly effective financial professionals

Referrals can help grow your practice—but many financial professionals aren't making referrals a regular part of their business. Why not? The three main reasons are: They forget to ask, they're afraid to ask, or they don't know how to ask.

Highly effective financial professionals always ask for referrals, and this flier will show you how easy it is to incorporate referrals into your practice.

5 ways to ask for referrals

			Words to use
	Thank you	When a client thanks you for helping them, take the opportunity to ask them to share their positive experience with others.	*"I'm glad this has been helpful to you. Can you think of anyone in your network who may also benefit from a solution like this?"*
	Ask for help	It's a simple tactic, but that's why it works. Come right out and ask if they'd be willing to help.	*"Based on our working together, could you give me the names of a few others who you think I could also help."*
	9 magical words	Sometimes being direct is your best option, so just ask the question.	*"Who else do you know that I could help?"*
	Personal and professional information	If a client gives you names, ask for more detail about those individuals—professional and personal. Knowing the facts can open the door for you.	*"What other details can you share?* ▪ *What do they do for a living?* ▪ *What hobbies do they enjoy?* ▪ *Are they married? Have children?* ▪ *What's their favorite sports team?"*
	Be my financial professional	Ask your clients to advise you: How would they set up a meeting with these referred individuals?	*"If you were me, how would you go about meeting these people?"*

Keep your referral source in the loop

They've shared their positive experience and recommended you to someone they know. Why not keep them informed?

- Call your client to let them know you've reached out for the introduction.
- Send your client a thank you note to let them know how much you appreciate the referral.
- After meeting with the individual, follow up with your client to share how it went.

Lincoln has a wealth of educational tools and resources to help you be more effective and grow.

Contact your Lincoln representative for more information.

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