

IDEAL CLIENT PROFILE QUALITIES SOUGHT

1. A decision maker for a company sponsored retirement plan.
2. Desire to build happier and healthier lives aligned with their values and their goals.
3. Seek a long-term relationship with a trusted advisor
4. Seek to simplify their lives with one-stop wealth management services
5. Want children and grandchildren to achieve the best educations.
6. Seek a secure retirement.
7. Promptly act on advice.
8. Have a household income of at least \$200,000 or a net worth over 2 million
9. Happy to refer everyone they know.