

Building a Golden Circle Around your Clients

By Sheryl Glasse - Auckland New Zealand



At the initial interview I provide the prospect with a brochure containing my Adviser Disclosure Statement, some recent newsletters, a pocket calendar and a short summary of the various Risk Protection Options I offer.

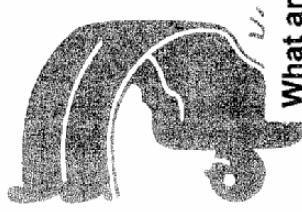
This gives the prospect confidence that he/she will be dealing with an adviser who offers her clients that extra service not received elsewhere.

(See samples below)

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independent professional financial advice



What are the risk protection options ?

Wrapping up the Options

When you put together a risk protection plan you're not only protecting you and your family against the financial consequences of becoming seriously ill or injured, but also the possibility of you or your partner's death.

At It Happens we can help you protect your financial health so you can cope if something does go wrong. Also we can explain these options in more detail and discuss the mix that's most suitable for your needs.

But first let's simplify what can be confusing – the different types of protection and their importance.

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As I launch my new logo and my new newsletter, I reflect on what a privilege it is to be working in this business. To meet new people because you have referred them to me, and to continue the relationships I have enjoyed with so many clients during the past 12 years



IT HAPPENS

Level 10, 17 Albert St, Auckland
T : 09 357 6444
F : 09 357 0480
M : 027 474 7755
E : sglasse@ithappens.co.nz
W : www.ithappens.co.nz



Sheryl Glasse

With Compliments...

IT HAPPENS

It Happens. We bend over backwards to ensure you're prepared.

