

Three Ways to be Paid

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At our first meeting with clients we explain that we get paid 3 ways —

- Fee for service for investment and retirement funding, product to us is inconsequential.

- Brokerage / commission for risk products
- By referral — we explain that we expect our existing clients, if they are happy with the advice and service that we provide, to refer new prospects to us.

This ensures that we are always dealing with people who have a similar outlook and attitude to our existing clients and negates our need to embark on time consuming marketing campaigns when this time is better spent on servicing our existing clients.