

# Ideal Client Profile and Introductions

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**Who do you know who fits in one of the following situations?**

Married with Children  
Approaching Retirement  
Recently Purchased or Refinanced a Home

**Places to look during the mortgage presentation:**

Children	Best Friend	Recently Purchased
Neighbors	Recently Married	Beneficiaries
Associates	Work Connections	Parents

**What questions can you ask before, during, or after the presentation to help discover people that are important to them?**

1. If you and your spouse pass away who would the home then go to?
2. What do you enjoy doing in your free-time and with whom?
3. What are your thoughts regarding your children's future education?
4. Who would the beneficiary and/or contingent beneficiary be?
5. What do you enjoy doing with your closest friend?

# Favorable Introductions

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- How did you feel when I first reach out to you and set this appointment?
- Now that you have seen the process to this point, how do you feel about it? Why?

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## *Introductions*

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Who do you know that is looking for a career opportunity/change?

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## *NOTES*

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