Personal Introductions

Desired Client Description

Age	☐ 21–30 ☐ 31–45 ☐ 46–55 ☐ 56–65 ☐ 66+
Marital Status	☐ Single ☐ First Marriage ☐ Other
Age of Children	☐ Under 18 ☐ Over 18
Occupation	☐ Executive ☐ Professional ☐ Business Owner ☐ Educator ☐ Technical ☐ Other
Income	☐ Under $50,000 ☐ $50,000–$75,000 ☐ $75,000–$125,000 ☐ $125,000–$250,000 ☐ $250,000–$500,000 ☐ Over $500,000
Social Style	☐ Analytical ☐ Driver ☐ Expressive ☐ Amiable
Education	☐ High School Graduate ☐ Some College/University ☐ College/University Graduate ☐ Post Graduate
Residence	☐ Single Family Dwelling ☐ Multiple Family Dwelling ☐ Condo Owner ☐ Renter

Potential Introductions

Date ______________________ Client ______________________

Note: This list is for our discussion and evaluation purposes ONLY. Without your written permission, no one will be contacted expressing your desire to introduce them to my services.

Name	Notes	(A, B, C, D)

Approved Personal Introductions

Date ____________ Client ______________________________

Name	Address & Email Address	Phone
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I grant the undersigned Financial Professional my expressed permission to contact the individuals listed above and give my approval for said representative to use my name in the initial contact, for the purpose of introducing them to the Leap Strategic Process™. There is no contractual or financial obligation of any party to this Agreement.

SIGNATURE OF CLIENT ____________ DATE ____________ SIGNATURE OF FINANCIAL PROFESSIONAL ____________ DATE ____________