

**Wilke & Associates**

Certified Public Accountants  
And  
Small Business Advisors

**David M. Wilke, CPA, MBA**

Managing Partner

Making  
Connections As  
A Trusted  
Advisor

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# Today We Will Apply Your Business Intelligence

- To avoid the risks that accompany being a trusted advisor
- To capitalize on the rewards that accompany being a trusted advisor
- To qualify introductions
- To discuss compliance and disclosure issues
- And relate to “best practices” we promote at our firm

# Risks VS Rewards

- Risks of being a trusted advisor
- Rewards of being a trusted advisor
- How I developed my network and relationships
- Example – Financial Advisors

# Qualifying Introductions

- Best practices to increase your value
  - You know both parties
  - You know they will be a fit for each other
  - You back it
    - Please meet or call the contact, if you don't feel it is a good fit, let me know and I will introduce someone else
- Avoid giving a list to your client to “interview”
- A favorite connection story (2010 buyout introduction)

# Compliance And Disclosure

- Documentation and fee disclosure issues
- Embarrassing introduction to a new financial advisor
- A bad introduction, turned good
- Biggest risk - likely new projects
- Lowest risk - likely qualified professionals



# What We Promote At Our Firm

- Qualified introductions
- Anticipate future problems for our clients and find reputable advisors
- Historical performance metrics

# Thank You



David M. Wilke, CPA MBA  
[dwilke@wilkecpa.com](mailto:dwilke@wilkecpa.com)

510 Washington Avenue  
Carnegie, PA 15106  
412-278-2200  
412-278-1998

- QUESTIONS?
- COMMENTS?