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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
- Capitalize on the rewards that accompany being a trusted advisor
- Qualify Introductions
- Apply Compliance and Disclosure

Risks VS Rewards

- Risks of being a trusted advisor
- Rewards of being a trusted advisor

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 interview



Compliance and Disclosure

- Documentation

Thank You



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- QUESTIONS?
- COMMENTS?