

Practice Development Series

Module 3: Prospecting / Activity 5 – Referred Lead

Aligned with the PFA™ Designation Program

Instructions: A referred lead sales track enables financial advisors to ask for referrals from contacts and clients. In the module, a sample was provided for you to consider. After reviewing the sample, utilize the template below to write your own referred lead sales track. Once written, rehearse it, adjust it to your style and practice it with a trusted colleague, your manager, or family member. Once you feel it fits your style, build it into your prospecting interactions.

Referred Lead Sales Track	Rationale

