

GOLDSBOROUGH'S REFERRAL POLICY

A referral from an existing client is the most popular way for someone to find their new financial planner.

With so many key decisions and long-term goals to be set, a referral from a friend or a colleague makes the decision of finding a financial planner that much easier. As a result, here at Goldsbrough we receive many referrals from our clients and treat each referral very seriously. If there was someone you knew who required our assistance in the future, you should be aware of our referral process as follows:

- All referrals from clients are treated on a no-obligation basis. We welcome the opportunity to meet with anyone who has been referred to us, but there is no pressure placed on them to proceed any further than an initial meeting.
- We maintain strict confidentiality and Privacy Policy procedures between clients and anyone they have referred. We cannot discuss either party's situation or disclose their decisions or objectives.
- We ask for a brief introduction to any client referral, to avoid any surprises. We are often introduced to referrals in person, by phone, via an email, or at one of our Seminars.



GOLDSBOROUGH

FINANCIAL SERVICES

LISTEN | RESPOND | DELIVER