

Bridge to Referrals

Are you capturing referable moments?

Anytime your clients are discussing financial matters and markets with friends, family or colleagues presents an opportunity for a referable moment. Often it's the perspectives you've shared through your "isms" and theses that can influence the conversation, transitioning to a discussion about you.

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What's an ism?

David Richman explains how isms can help strengthen your personal brand and build a bridge to referrals.

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