

## VIDEO TITLE: Sounding Board

Target Audience: Clients & Prospects

Estimated Total Runtime: 1:45

Strategy: Video Script only

[Eric]

Do you have someone in your life who's struggling with a tough financial decision? Maybe they're feeling uncertain about the markets or their financial future.

I want you to know, that if they're important to you... they're important to me. And I am happy to offer a free "Sounding Board" service. This is part of our process. It's a value-added service many our clients have found to be of benefit. Frankly it's one of the most fulfilling aspects of my job and one of the primary reasons I became a financial advisor."

Having a financial sounding board is like having a compass on rough seas – it can provide clarity, comfort, and guidance to chart the right course.

Making an introduction for a Sounding Board meeting is simple...

First, share our process with your friend, family member or colleague and make sure they are interested in having the conversation. Let them know there is NO Cost OR obligation whatsoever.....

Then, reach out to us to share relevant and important details you want us to know about them. Next, we will reach out to them on your behalf.

And we will send them our introduction kit if they have an interest.

Finally, we will follow up and schedule a "sounding board" meeting.

Sometimes people just need a second opinion. Many times they HAVE a plan, and it just needs minor changes. Other times, there is NO PLAN – that's when we look at financial goals, their values, and we may suggest some strategies, and build a roadmap to help them get on a better path.

Either way, it's a helpful conversation.

At Apex Securities & Asset Management we care about you and your financial future – and the well-being of your loved ones. So don't keep us a secret!

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