



The DKE Referral **JUMP-START**



To jump-start your referral effectiveness, complete the following worksheet.

1. Describe your very best clients:

Age: _____
Income: _____
Assets: _____
Occupation: _____
Marital/family status: _____
Other relevant facts: _____

2. Thinking only about your top three clients, describe the things they are most passionate about:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

3. Again, in direct reference to your top three clients, describe the characteristics they possess that you admire the most:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

