

Five-Step Referral Log for Professionals

Referral Name: _____ Phone: _____ Email: _____

Source Name: _____ Phone: _____ Email: _____

STEP 1: RECOGNITION

Brief telephone call thanking colleague for referral:

- You are touched by their confidence
- You will give it your immediate attention
- You will make sure to keep them posted
- Send referral note within 24 hours

Update referral tracking sheet

Notes: _____

Completed on _____ by _____

STEP 2: ENHANCEMENT

Brief call to learn more about the prospect/follow up if not heard back:

- If no appointment set, call to let colleague know
- If appointment set, cc: colleague on confirmation letter and draft handwritten note
- Thank you again for referral; you will do your best to enhance colleague's relationship
- What should I know about the prospect?
- Schedule follow up call to review specifics if prospect permits

Notes: _____

Completed on _____ by _____

STEP 3: PARTICIPATION

Follow-up call to colleague to discuss prospect:

- If appropriate discuss needs/situation
- Additional colleague input
- Encourage “team approach” and include in appropriate meetings/introductions
- You’ll do your best to enhance colleague’s relationship

Notes: _____

Completed on _____ by _____

STEP 4: INITIAL MEETING

Host initial meeting with prospect

Notes: _____

Completed on _____ by _____

STEP 5: FOLLOW UP

AM/PM Rule: Let colleague know outcome, making sure they know you were looking out for the team and client; support colleague’s further involvement if appropriate, offer assistance and encourage “referral” behavior.

Update referral tracking sheet

Notes: _____

Completed on _____ by _____

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