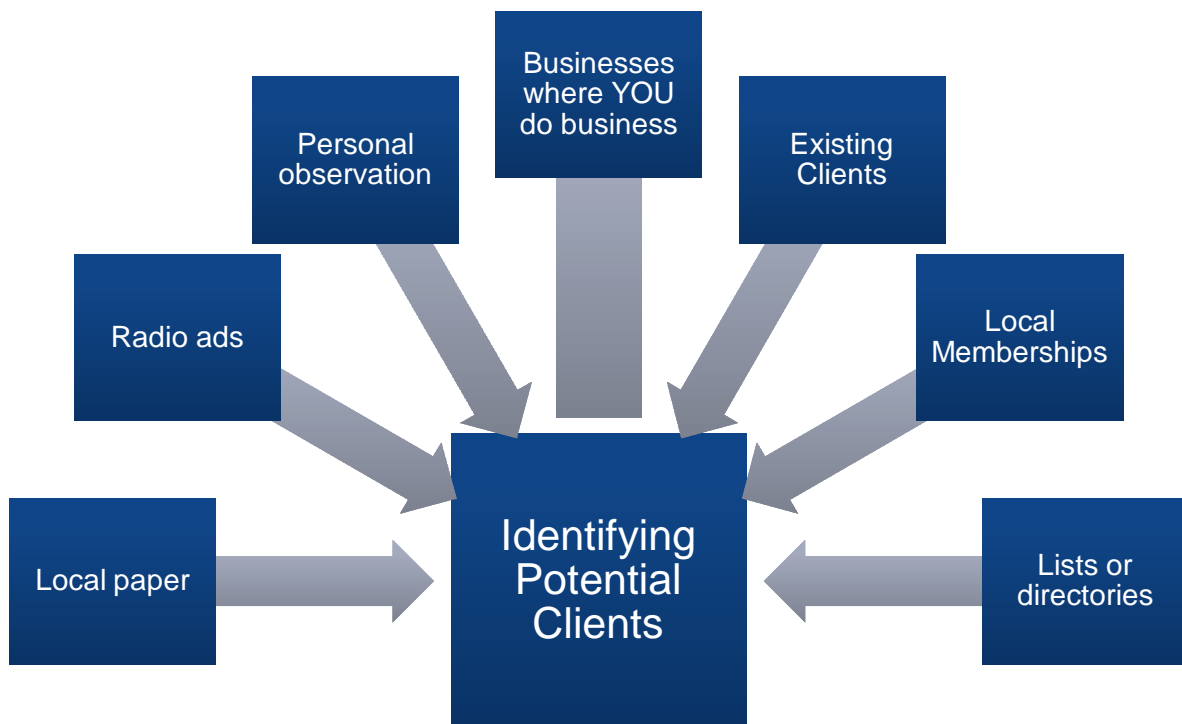


# You have something they need. How do you approach them?

## TALK to them!

- Telephone Approach
- Pre-approach letter (with follow up)
- **CPA's & Accountants**
- Walk in and visit
- Lunch/Dinner/Drinks
- Lunch & Learn
- B to B Meetings
- Recreation Events (golf, Rotary, celebrations)
- Lead Vendors



For Training Purposes Only- Agent Use only