

Sounding Board Process

As a service available only to our most valued clients, we make ourselves available to help those family, friends and colleagues who are important to you and who are apprehensive about their future. If they are important to you then they are also important to us. We will be happy to sit down and share our process with them to see if we may be a good fit to help. Should either of us feel we are not a good fit, we will do our best to introduce them to someone else. They do not need to become our client to take advantage of this value-added service.

Sounding Board Steps



Let them know you will share contact information with us for purposes of an introduction



Contact us to share relevant and important details about the friend or family member



We will reach out on your behalf as requested



We send them our introduction kit



We will follow up and schedule a “sounding board” meeting