



## *Wilson Rogers & Company*

*Public Accounting - Tax Services - Consulting - Education - Debt Solutions*

### **How to Refer Others to Wilson Rogers**

Referrals are our primary method of marketing. We have found that a prospective customer who is referred to us is better prepared to appreciate the value that we can offer. We understand the trust you place in us when you make a referral and because of that, we want to demonstrate our appreciation by sending you a special gift once your referral becomes one of our customers. To make the referral process as easy as possible, here is a guide for you to use when you refer us to your colleagues, friends and neighbors.

### **How to Spot Our Primary Customer**

Our customers tend to be working professionals, middle class families and owners of real estate or small businesses. While we'll never turn anyone away, we have extensive experience helping the individuals listed above navigate their often-times complex tax and financial situations. Additionally, these individuals know and value the expertise of having a CPA on their team and in their corner.

### **How to Best Communicate What We Do**

For individuals, we help them spend less time dealing with their tax and financial matters and more time enjoying their free time and money. We do this by building a trusted relationship, offering exemplary customer service and making ourselves available year round to handle their questions and concerns.

For small business owners, we help them spend less time balancing their books and chasing sales and more time growing their sales and working with profitable clients. We offer bookkeeping and financial services custom tailored to their needs. Additionally, we guide, coach, consult and hold our customers accountable so that they can achieve their desired level(s) of success.

### **How Our Customer Referral Process Works**

After we receive your referral, we will contact the person directly. During this initial conversation, we will talk about their tax/financial situation and any problems they are experiencing. Often the conversation results in a meeting where we discuss in depth the challenges they are facing, both short-term and long-term goals and how we may be able to help them achieve those goals.

Once your referral pays for their services, we will send you the following gift:

- If you **refer 3 customers** to us, you will **receive a \$100 gift card**
- If you **refer 5 customers** to us, you will **receive a \$200 gift card**

Please note that you can earn an "unlimited" number of gift cards, however, they are only awarded if you hit the specified level. If you fall somewhat short of the numbers (i.e. 2 or 4) you will receive a 10% discount off of your bill for each referral (or a refund paid via check if you've already paid).