

Client Ambassador Program



**We are very fortunate and grateful
to have such wonderful clients like you!**

Thank you for being our client! One of the ways in which we differentiate our services from others is that we focus on long-term relationships with our clients and continuously search for ways to provide additional quality services. We appreciate that you have chosen us to help you work on your financial goals.

One theme that you have probably heard from our office already is our company's growth initiative. It is our goal to offer our services to several other clients just like you. Did you know that many of our new clients come from introductions? It is primarily through an introduction from our best clients that we have been able to meet high quality people who can benefit from our services.

We are excited to announce this year's *Client Ambassador Program*. We will be hosting an event exclusively for our Client Ambassadors this year. Any client who introduces us to a friend, colleague, or family member can qualify. This event is a way for us to say "thank you" to those clients who have qualified for our Client Ambassador Program, as well as to encourage others to join in this special group.

Besides having a great time, we will be sharing with you any economic updates and current issues that may be affecting you. The only thing we ask from you is to bring a friend or family member who you think may benefit from our services and is interested in learning more about these topics as well.

**Thank you for being a valuable
client and supporting
our "Growth Initiative."**

**We appreciate your continued
support, business, and
introductions!**



Thank you!

**Thank You for Helping
Our Growth Initiative**

What is a Client Ambassador?

Any client who introduces us to a friend, colleague, or family member who can potentially become a client can qualify.

Whether this friend or family member does business with us or not, you qualify for our Client Ambassador Program.



WILLOWTRUST
WEALTH MANAGEMENT

You're Invited

Client Ambassador Program Event

For those clients who have a friend join them as an attendee to one of our upcoming educational workshops or who refer a friend to sign up for a no-cost complimentary financial check-up, we will be holding a special and fun *Client Ambassador Program Event* annually!

To participate, call 919.562.5072 and let us know that you are interested.

If you would like to participate, please call
919.562.5072 and we would be happy to assist you!