



PRM

FINANCIAL SERVICES



for peace of mind



WE WELCOME YOU

Sincere Greeting in the way you would greet people you meet.

Paragraph 1—Intro about who your clients are for you and why they matter.

Segue into “what sets is apart”.

Reason #1 (NOT customer service, location or products)

Reason #2 (NOT customer service, location or products)

Reason #3 (NOT customer service, location or products)

Paragraph 2—Set expectations about how you and your Team work.



OUR AGENCY



Address Info goes here | Phone number goes here

2-3 Short paragraphs that give a sense of your company culture as well as a little background

Talk about your Company.

Give a brief history.

Elaborate on your Company Standards of Excellence or elude to your Client Satisfaction Manifesto.

Give them 3 easy steps to take when they get this Welcome Packet, such as:

1. Open our Facebook page and view our photo albums
2. Like us on Facebook so you can receive our community updates and participate in our {ACTIVITIES / CONTESTS}.
3. Join us! Find an activity you can support, such as our {FUNDRAISER OR CHARITABLE CAUSE} or join our team for {CHARITY EVENT}.

Include your critical contact info, address, website, email addresses, etc.

Thank them again—for taking action

Signature

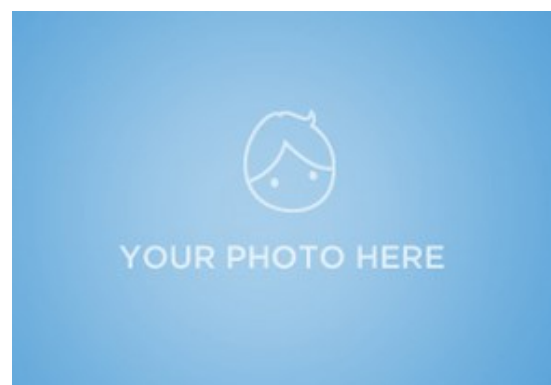


Photo caption. Include a caption so they learn more about you

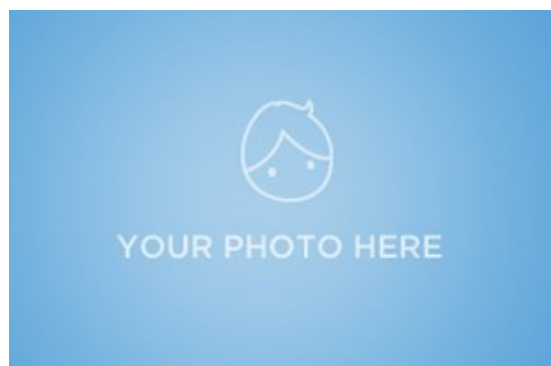


Photo caption. Include a caption so they learn more about you

OUR TEAM



Address Info goes here | Phone number goes here

**Your
Image
Here**

PRINCIPAL NAME

Personal things, such as “Mother of 4 great boys and avid hockey fan”

Direct Phone – 555-555-5555

Email – principal@ourcompany.com

Paragraph about you. Include 1-2 personal items and describe what you do in the business. Describe it in a way that conveys how you will take care of them as your client.

**Your
Image
Here**

Team Member

Personal things, such as “Mother of 4 great boys and avid hockey fan”

Direct Phone – 555-555-5555

Email – team@ourcompany.com

Paragraph about team member. Include 1-2 personal items and describe what they do in the business. Describe it in a way that conveys how they will take care of them as a client.

**Your
Image
Here**

Team Member

Personal things, such as “Lover of all things chocolate and Husband to a great cook”

Direct Phone – 555-555-5555

Email – team@company.com

Paragraph about team member. Include 1-2 personal items and describe what they do in the business. Describe it in a way that conveys how they will take care of them as a client.



HOW WE GIVE BACK

Address Info goes here | Phone number goes here

We Contribute

Talk about places or ways you contribute financially or fundraise for local or national causes. Share WHY you contribute to that particular cause



Photo caption. Share something personal about the experience of making the contribution

We Volunteer

Describe the ways you and your Team volunteer. Include where you do so and perhaps even some of the activities you do. If space allows, describe WHY you do it.

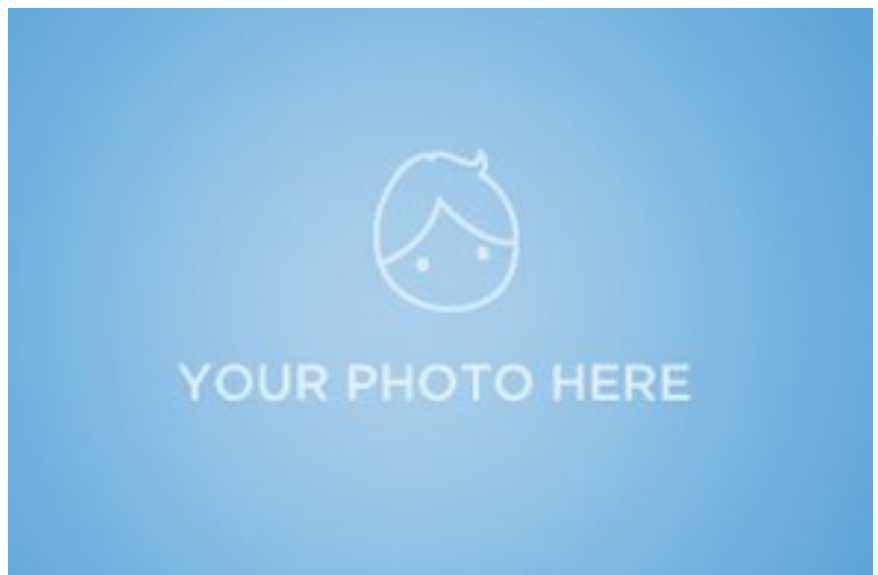


Photo caption. Share something personal about the experience of making the contribution

WE LIKE TO SHOW YOU OUR GRATITUDE



Address Info goes here | Phone number goes here

The {XYZ COMPANY} “Help our Community” Referral Program

Welcome them to the program and say a little about why you believe in doing so. Tell them how it works:

Each time we receive a referral from you, your name is entered into our monthly and annual referral drawings. What qualifies as a referral? {Explain what you qualify as a referral.}

The following is an example of a referral program. This example is for reference only, and some or all components of the program may not be legally permitted in certain states:

- For every referral we receive we will donate \$10 to the {CHARITYABLE ORGANIZATION OR CAUSE}.
- We hold a monthly drawing from all the names of people that referred someone to us.
 - * For our monthly drawing, the monthly prize is {\$XXX} and is given to the charity of the winner’s choice.
 - * Each referral equals one entry into our monthly drawing
 - * We’ll announce who won in our monthly newsletter.
 - * If you are the monthly winner, we’ll ask you for a picture of you and your charity, and will feature your charity in {NEWSLETTER OR JOURNAL OR LOCAL NEWSPAPER}!
- For our annual drawing, the annual prize is {\$1XXX} and is given to the charity of the winner’s choice. If your name is drawn, we hope you’ll join us to deliver this to your favorite charity!
 - ◇ Each referral you’ve given throughout the year equals one entry for our annual drawing.
- That’s it. The person you refer doesn’t have to purchase a policy or obtain a quote from us if we’re not competitive for your referral to count. There are many worthy charitable organizations in our community. Help us help them!

Our referral program is open to anyone, whether they’re a client or not. {INCLUDE APPROPRIATE LEGAL INFORMATION HERE}

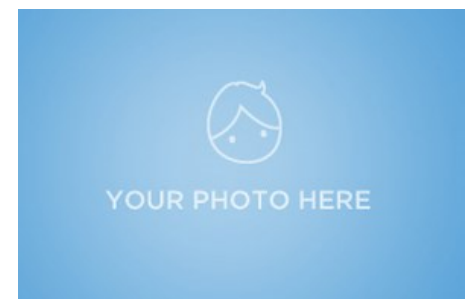


Photo caption. Give an example of a happy referral situation or a reason why clients refer..

{INCLUDE YOUR AGENCY’S PERSONALIZED INFORMATION. REFERRAL PROGRAMS AND DRAWINGS ARE REGULATED ON A STATE-BY-STATE BASIS; THEREFORE, YOU ARE SOLELY RESPONSIBLE FOR ENSURING THAT YOUR REFERRAL PROGRAMS COMPLY WITH ALL RELEVANT LEGAL REQUIREMENTS.}

WHAT OUR CLIENTS SAY ABOUT US



Address Info goes here | Phone number goes here

"Thanks, so much for your great service! We were so pleased with your {BENEFIT}, and with the way that you {SERVICE}."

- Happy Client

"We've been a client of XYZ for {NUMBER} years. Just wanted you to know we love your {BENEFIT} and really appreciate {BENEFIT}."

- Happy Client

"We love XYZ ! They have {BENEFIT} and we {HAPPY EXPERIENCE}."

- Happy Client

"The team at XYZ {SERVICE INCIDENT}. We recommend you to anyone needing {SERVICE}. Thanks again!"

- Happy Client

"For over {NUMBER} years we never thought {PROBLEM}. {PROBLEM AND XYZ'S SOLUTION OF THE PROBLEM}. I'm so glad we work with you."

- Happy Client

"The support XYZ always shows through for {COMMUNITY OR CHARITY OR CAUSE} by [VOLUNTEER EXPERIENCE] makes a huge difference for {RECIPIENTS}. We are so grateful and proud to say that you are our {XIZ TYPE OF SERVICE}. We never had this kind of community contribution with our last {SERVICE TYPE} company!"

- Happy Client

**{USE PERSONALIZED INFORMATION.
YOU MUST REQUEST PROPER CONSENT FROM CUSTOMERS TO USE COMMENTS,
TESTIMONIALS, AND FULL NAME IN MARKETING MATERIALS}**