Asset 7

Referral Partner Introduction Kit

How to Help Referral Partners Introduce the Right Owners Into the System

OptionBuilt™ Owner Activation System

Advisor Toolkit Asset 7: Referral Partner Introduction Kit

How to Help Referral Partners Introduce the Right Owners Into the System

Purpose of This Tool

This tool helps approved OptionBuilt™ Advisor Network partners explain the Owner Activation System to referral partners.

The advisor ask is simple:

Explain who the system helps. Give referral partners a simple way to describe it. Identify owners who may be a fit. Ask for a warm introduction. Invite the owner into the Personal Freedom Score™.

That's it.

The goal is not to teach referral partners the full OptionBuilt™ system.

The goal is to give them a clear, useful reason to introduce you to business owners who may benefit from a better conversation.

The Big Idea

Give Referral Partners a Better Reason to Introduce You

Most referral partners do not want to send another generic advisor introduction.

They need a better reason.

Instead of saying:

> *"You should meet this advisor."*

The referral becomes:

> *"You should talk to this advisor because they have access to a simple process that helps owners connect what they want personally, what the business needs to become, and what planning needs to happen next."*

That is more valuable.

It gives the referral partner a clearer story.

It gives the owner a better reason to engage.

Who This Is For

Referral partners may include:

CPAs
Attorneys
Bankers
Insurance professionals
M&A advisors
Business brokers
Consultants
Valuation professionals
Other trusted business owner advisors

The best referral partners already see owners delaying important planning because they are buried in the business.

Who the Referral Partner Should Think Of

Ask referral partners to think of owners who:

Own a successful business Have most of their wealth tied up in the business Are still heavily involved day-to-day Know planning matters but keep delaying it May be 3–10 years from a possible transition Need better coordination across tax, legal, wealth, business, or estate planning Want more time, optionality, or flexibility Are successful but personally stretched Would benefit from a simple first step instead of another heavy planning conversation

Referral Partner Conversation Flow

Use these points as the conversation flow.

1. Start With the Owner Problem

Many successful owners know they need better planning, but they delay because the planning feels disconnected from the business results they are trying to achieve right now.

2. Introduce the Process Simply

The Owner Activation System helps owners connect what they want personally, what the business needs to become, and what planning needs to happen next.

3. Explain the First Step

The first step is a five-minute Personal Freedom Score™.

It gives the owner a quick snapshot of where life, business, and financial alignment may be strong or stuck.

4. Explain Why It Helps the Referral Partner

It gives the owner value right away and creates a better conversation than a generic advisor introduction.

5. Ask for the Introduction

Ask whether they know one or two owners who may benefit from that kind of first step.

Short Referral Partner Script

Use this when you need to keep the conversation simple.

> *“I’m using a process that helps business owners connect what they want personally, what the business needs to become, and what planning needs to happen next.”*
>
> *“A lot of successful owners know they need better tax, legal, wealth, estate, liquidity, or succession planning, but they delay because it feels disconnected from the business results they are trying to achieve right now.”*
>
> *“The first step is a simple five-minute Personal Freedom Score™. It gives the owner a useful snapshot and creates a better conversation.”*
>
> *“If you know owners who are successful but stuck, or who keep delaying planning because they are buried in the business, this may be a helpful first step for them.”*

Warm Introduction Request

Use this when asking a referral partner for an introduction.

> *“Is there one owner who comes to mind who is successful, but may be stuck trying to connect what they want personally, what the business needs to become, and what planning needs to happen next?”*
>
> *“If so, I’d be happy to offer them the Personal Freedom Score™ as a simple first step. It takes about five minutes and gives them a useful snapshot before any deeper planning conversation.”*

Referral Partner Email

Use this when introducing the system to a referral partner.

> *Subject: A simple first step for business owner clients*
>
> *Hi [First Name],*
>
> *I wanted to share a simple resource I’m using with business owners who may need a better way to connect what they want personally, what the business needs to become, and what planning needs to happen next.*

A lot of successful owners know they need better tax, legal, wealth, estate, liquidity, succession, or exit planning, but they keep delaying it because it feels disconnected from the business results they are trying to achieve right now.

The first step is a five-minute Personal Freedom Score™.

It gives the owner a quick snapshot of where their life, business, and financial world may already be aligned — and where there may be gaps worth looking at.

It is not a heavy planning process. It is simply a better starting point for a more useful owner conversation.

If you know an owner who is successful but stuck, overly dependent on the business, or delaying important planning because they are buried in the day-to-day, this may be a helpful first step.

I’d be happy to talk through who may be a fit.

Best, [Advisor Name]

Referral Partner Introduction Email

Use this when the referral partner is introducing you to an owner.

> *Subject: Introduction*
>
> *Hi [Owner First Name],*
>
> *I wanted to introduce you to [Advisor Name].*

[Advisor Name] is using a process designed to help business owners connect what they want personally, what the business needs to become, and what planning may need to happen next.

The first step is a simple five-minute Personal Freedom Score™. It gives owners a quick snapshot of where life, business, and financial alignment may be strong — and where there may be gaps worth discussing.

I thought it may be useful based on what you are building and some of the decisions you may be thinking through.

I'll let the two of you connect from here.

Best, [Referral Partner Name]

Advisor Reply After Introduction

Use this after the referral partner makes the introduction.

> *Subject: Re: Introduction*
>
> *Hi [Owner First Name],*
>
> *Great to meet you, and thank you, [Referral Partner Name], for the introduction.*

As [Referral Partner Name] mentioned, the first step is simple. The Personal Freedom Score™ takes about five minutes and gives business owners a quick snapshot of where their personal goals, business priorities, and financial options may already be aligned — and where there may be gaps worth looking at.

It is not a full planning process and it is not meant to solve everything. It simply gives us a better starting point for a useful conversation.

I'm happy to send you the link or walk through it together if that is easier.

Best, [Advisor Name]

Text / DM to Referral Partner

Use this for a quick follow-up.

I'm using a simple five-minute Personal Freedom Score™ with business owners. It helps them connect what they want personally, what the business needs to become, and what planning may need to happen next. If you know an owner who is successful but stuck or delaying planning because they are buried in the business, this may be a helpful first step.

What to Avoid

Do not make the referral partner explain the full OptionBuilt™ system.

Do not ask for a generic referral.

Do not lead with the book, Execution Guide, or 30-day owner-only experience.

Do not make the referral partner feel like they are selling a program.

Do not position the score as a diagnostic or planning engagement.

Do not overcomplicate the introduction.

Advisor Checklist

Before talking to a referral partner:

- ☐ Identify why this partner is relevant
- ☐ Know what type of owner they serve
- ☐ Be ready to explain the Personal Freedom Score™ in one sentence
- ☐ Ask for one or two specific owner introductions

After the conversation:

- ☐ Send the referral partner email if needed
- ☐ Provide the introduction language
- ☐ Follow up on any names discussed
- ☐ Invite introduced owners into the Personal Freedom Score™
- ☐ Keep the referral partner updated appropriately

Key Reminder

Referral partners do not need the full system.

They need a simple reason to introduce you.

The Personal Freedom Score™ gives them that reason.

Start with the score.

Create a better owner conversation.

Then let the process do its job.