

Partnership Bill of Rights

As my client and partner, you are entitled to:

- *Professional, prompt and courteous service at all times...from me...my staff...and my company.*
- *Integrity in every aspect of our relationship.*
- *My sincere concern as I listen to your needs and recommend meaningful solutions.*

Once you are my client, I am on retainer. I will work for you seven days a week, twenty-four hours a day.

As your partner, these are my rights:

- *When I call you, please pick up the telephone. If you can't come to the phone, please return my call. Never avoid me, please. I will call you two or three times a year. When I do call, I will have an idea relating to the creation and protection of your wealth. I will always have your best interest at heart.*
- *I am entitled to a yes or no. A maybe kills opportunity. The more times I get misled by a maybe, the less time I have to serve you or develop new clients. Building and servicing my clientele is my livelihood. To me, a no does not mean never. It simply mean not now. So please understand that in all cases, I need a yes or no.*
- *If I perform to your satisfaction and standards, then I want to meet some of the people you know. I will never embarrass you. Again, building and servicing my clients is my livelihood, and I want you to feel comfortable working with me.*
- *Finally, I am entitled to both positive and negative feedback. Most industries have poor feedback systems. We hear only the bad news. Of course, I want to know when you are upset, but I also need to know what's working well.*

Advisor

Client

Date

Date