REFERRAL POLICY

At Goldsborough, we are fortunate that we have continued to grow over the many years we have been in business, thanks largely in part to client referrals. We take it as a wonderful compliment, as it reflects the trust and value our clients place in us, and the services we provide.

With so many key decisions and long-term goals to be set, a referral from a friend or a colleague makes the decision of finding a financial planner that much easier.

If there is someone you know who may require our assistance in the future, you and your friend or family member can both be reassured that our referral process is as follows:

- **All referrals from clients are treated on a no-obligation basis**. We welcome the opportunity to meet with anyone who has been referred to us, but there is no pressure placed on them to proceed any further than an initial meeting.

- **We maintain strict confidentiality and Privacy Policy procedures** between clients and anyone they have referred. We cannot discuss either party's situation or disclose their decisions or objectives.

- **We ask for a brief introduction** to any client referral, to avoid any surprises. We are often introduced to referrals in person, by phone, via an email, or at one of our Seminars.

If you have any questions about referring a friend or family member, please don't hesitate to speak with your Goldsborough Adviser as they would be more than happy to help.