



ORANGE PARK MEMBER RESOURCE

Financial & Professional Services

For banking, insurance, financial planning, business services, technology, and recruiting.

Put this into practice

- ✓ Define a service trigger such as a business launch, coverage review request, system failure, hiring need, or change in financial goals.
- ✓ Explain your process and who you can serve; distinguish an introductory conversation from a recommendation or guaranteed outcome.
- ✓ Ask the prospective client what information they are comfortable sharing. Keep account, financial, and employment details private.
- ✓ When multiple specialists are involved, state each person's role and let the client decide whether to proceed.
- ✓ Give a timely, specific follow-up after an introduction without discussing confidential facts in chapter channels.

Use these words

When a business owner says [specific challenge], I can explain [your process] and whether I am the right fit. An introduction is enough; I will handle the details privately.

Would you like me to share the professional's contact information, or would you prefer an introduction with your permission?

Write your own version

My best-fit customer or member: _____

A clear situation that tells me to act: _____

The first step I will take this week: _____



Make it repeatable

Use this page as a short working sheet. Assign a next step before the conversation ends.

Before you share or recommend

- ✓ Have I confirmed the member's scope, geography, and any required authorization?
- ✓ Did I disclose material relationships when required?
- ✓ Am I avoiding promises of savings, returns, coverage, or job placement?
- ✓ Did I avoid sending protected documents through group chat?
- ✓ Is the next step clear and under the client's control?

Your next 30 days

- ✓ Week 1: Define three events that make a timely introduction useful.
- ✓ Week 2: Explain your intake process to two members.
- ✓ Week 3: Prepare a privacy-safe referral handoff message.
- ✓ Week 4: Review whether referrals matched your scope.

Track the outcome

People I contacted: _____ Useful introductions: _____ Follow-ups completed: _____

One thing I learned this month: _____

My next specific ask: _____

Further reading

Federal Trade Commission, Endorsement Guides FAQ:

[ftc.gov/business-guidance/resources/ftcs-endorsement-guides-what-people-are-asking](https://www.ftc.gov/business-guidance/resources/ftcs-endorsement-guides-what-people-are-asking)

These are practical discussion tools, not guarantees of referrals or business outcomes. Respect privacy, obtain consent before sharing contact details, and follow applicable professional rules.