



MSF Networking - We work for each other & we are the best place to grow your business



FINANCIAL PLANNER - 60 SECOND EXAMPLES (FEEL FREE TO COPY)

Financial Planner #1

Hi, I'm Erin Walsh with NorthStar Planning. Professional service delivered with care. I'm looking for couples earning 150,000 to 350,000 dollars who keep large savings in cash because markets feel confusing. An engineer couple sat on 120,000 dollars. We built a six-month emergency fund and invested the rest by goal and timeline. Now college and retirement are on track. This week I'm looking for high earners who are holding cash and want a plan they trust. When you hear "we are waiting until things calm down," introduce us. I'm Erin Walsh with NorthStar Planning. Clarity creates confidence.

Financial Planner #2

Hi, I'm David King with HarborPoint Wealth. Professional service delivered with care. I want recent retirees with 500,000 to 1,500,000 dollars who do not have a tax-smart withdrawal plan. A teacher couple pulled randomly and paid avoidable taxes. We layered Social Security timing, Roth conversions, and distribution buckets. Income became steady and efficient. This week I'm looking for new retirees who want predictable income that lasts. When you hear "we are not sure what to sell," think HarborPoint. I'm David King with HarborPoint Wealth. Make work optional and keep more. Expect fewer surprises and more confidence. We begin with a short discovery call to confirm fit and goals. Next we outline a simple plan with clear steps, dates, and owners. Expect direct communication, transparent pricing, and realistic timelines.

For more examples go to www.msfnetworking.com