



May 2014 Newsletter

How many of you really know your client? Most of you have heard this question before. One of the caveats of being a good advisor is listening to your client, allowing them to speak and learning as much as you can. But you can also learn important facts by researching your client before you engage them. What is the size and years in business? How many employees are there?

Think about their business and what operational expenses are specific to them that may differ from the standard twelve we list. Try to get your mindset into that of the owner of the business you are calling on.

While we offer you industry specific guidelines, you need to think outside the box, be creative and continually come up with new and fresh ideas. Remember, your head advisors, Hal and Walter, with a combined 73 years of business experience, are here to help you with any aspect of your consulting business.