# 📄 Local Partner Script Guide

*How to Connect with Realtors, Loan Officers, CPAs & Small Business Owners*

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**Build relationships with professionals who already serve the people you protect.**

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### ✅ Overview

Partnerships with local professionals can open the door to steady, high-trust referrals—if you approach it the right way. This guide gives you simple, proven scripts to start conversations with realtors, mortgage professionals, CPAs, and small business owners in your community. These are low-pressure, professional messages designed to spark connection—not feel like a cold pitch.

### 📬 Initial Email or DM Script (LinkedIn, Email, or Facebook)

**Subject:** Quick Question About Your Clients

Hi [First Name],
I hope this finds you well. I work with families here in [Your City] to make sure their mortgage and income are protected—especially when they've just bought a home or had a major life event. I thought there might be a natural fit between what we each do.

Would you be open to a quick chat to see if there's a way we can help each other out?

No pressure either way—just thought it made sense to connect.

Best,
[Your Name]
[Phone] | [Website or Profile Link]

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### 🗣️ Phone or In-Person Script

"Hey [Name], I help a lot of families in this area to make sure they're protected after big life changes—buying a home, switching jobs, retiring, that kind of thing.

I wanted to introduce myself in case any of your clients ever mention needing coverage, or even just understanding what they already have. I also love having people to refer *my* clients to when they need a good [realtor / mortgage advisor / CPA / etc.].

Would it make sense to stay in touch?"

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### 🧠 Pro Tips

- Offer something first.
  *"If you ever have a client who needs a quick policy review, happy to do that at no charge."*
- Don't ask for referrals right away. Build the relationship first.
- Add them to your CRM or spreadsheet for occasional follow-up.
  *"Just checking in—how's business been for you this quarter?"*