Quick Referral Partner Guide

FOR TRUST & ESTATE ATTORNEYS

***AADMM-accredited** daily money management and financial caregiving services supporting legal professionals and the clients they serve.*

ASSURANCE
Family Partners

How AFP Helps

IDEAL CLIENT PROFILES & REFERRAL INDICATORS

When to Consider Referring AFP

Introduce Assurance Family Partners when a client is experiencing:

- Financial disorganization impacting trust and/or estate planning implementation
- Difficulty gathering or following through on documentation requests for trust or estate administration
- Ongoing bill payment or financial oversight concerns
- Fiduciary responsibilities requiring day-to-day administrative support, including structured reporting
- Family tension around financial responsibilities
- Increased vulnerability to fraud or financial risk

How AFP Helps

AFP provides structured, day-to-day financial oversight so legal professionals can remain focused on legal advice and strategy—not financial administration. We support clients by:

- Managing bill payment and financial organization
- Maintaining accurate records and documentation
- Monitoring for unusual or high-risk activity
- Coordinating with the client's professional team

➔ Clients remain in control ➔ We work alongside you — not in place of you

How to Refer (Takes Less Than 2 Minutes)

Option 1:
Warm Introduction
(Recommended)

Send an email introducing AFP to your client.

Option 2:
Direct Referral

With client consent, provide contact details and we will initiate communication.

Option 3: Client-Initiated Contact

Share our information and invite the client to reach out directly.

How to Refer a Client

A SIMPLE, PROFESSIONAL PROCESS

Copy + Paste Email Script (Use This)

Subject: Additional Support for Financial Organization

Hi [Client Name],

As part of ensuring you have the right support in place, I'd like to introduce you to Assurance Family Partners.

They specialize in daily money management and financial organization, helping individuals who would benefit from consistent oversight and structure.

They work collaboratively with legal professionals and focus on bill payment, financial organization, documentation, and coordination across the client's professional team.

I believe this could help simplify day-to-day financial responsibilities and provide added stability and peace of mind.

I'm connecting you here so you can learn more and determine whether it feels like a good fit.

Best,
[Your Name]

What to Say in Conversation
(Quick Talking Points)

- *"This isn't about taking control away — it's about adding structure."*
- *"They focus on day-to-day financial organization."*
- *"They work alongside professionals, not in place of them."*
- *"They're methodical, confidential, and accredited."*

What Happens Next

- *Referral is acknowledged promptly*
- *Client is contacted to complete intake and schedule an intro conversation (call including you, if you like)*
- *Scope and next steps are clearly outlined*
- *Communication stays within professional boundaries*

Response time: *typically within 24 hrs*

Why Partner With AFP

A REFERRAL RELATIONSHIP BUILT ON PROFESSIONAL STANDARDS

Why Legal Professionals Refer AFP

- Reduces professionals' administrative disruption and out-of-scope financial responsibilities
- Supports productive trust or estate administration
- Improves coordination across the client team
- Brings structure to the complex situations of overwhelmed fiduciaries
- Maintains clear professional boundaries

Professional Standards

- **AADMM-accredited** Daily Money Management firm
- Professional liability insured
- Background-checked
- Strict confidentiality and documentation standards

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https://assurancefamilypartners.com/contact-us/

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Need to Talk Through a Situation First? *We're happy to discuss a client confidentially before you make a referral.*

ASSURANCE

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