



## REFERRAL/CENTER OF INFLUENCE SOURCES WORKSHEET

Name \_\_\_\_\_ Date \_\_\_\_\_

**Source**                      **Method of Contact**                      **Target Month to Contact**  
(Note, phone, social, etc.)

**Real Estate Agents**

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**Attorneys**

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**Accountants/CPAs**

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**Fellow Board Members**

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**Chamber Members/President**

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**Architects/Engineers**

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**Bankers/Stock Brokers/Financial Advisors**

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**Advocates/Raving Fans/Business Leaders/Community Members, Neighbors, etc.**

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**Note: Referral/COI sources can be current or former clients and prospects as well.**

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PEOPLE \* PROCESS \* PRODUCTIVITY \* PROFIT