

# Reward Yourself Today

## With Insured Wealth Management's VIP Membership Program

### What is the VIP Membership Program?

The VIP Membership Program is a way for our clients to earn rewards for referring their friends and family to Insured Wealth Management. We know you like to refer people to us in the first place, but this is just our way of saying thank you to our loyal clients.



### Guidelines of the VIP Membership Program

- You must be a client of Insured Wealth Management to earn points.
- When you refer an individual or couple, age 50 or over, and they attend one of our seminars, you receive 25 points.
- When you refer an individual or couple, age 50 or over, and they attend a free consultation, you receive 50 points.
- When you refer an individual or couple, age 50 or over, and they become a client, you receive 100 points.

For you to receive points, your referrals must be new to Insured Wealth Management (have never come in before and have not been referred by another client).

Each point is worth \$1. You can redeem your points in increments of \$25 anytime for whatever amount of points you wish. Alternately, you can accumulate your points for payout at the end of each year.

*You can request a gift card by calling 972-767-8370. Gift cards must be picked up from our office.*

### Who should you refer to Insured Wealth Management?

The people we can help the most are people just like you. We work exclusively with couples and individuals over the age of 50, who are preparing for or are already in retirement. Typically, these clients have a net worth of at least \$250,000, have a strong sense of commitment and family, and are nice people that are easy to get along with. We want to help guide your friends, family members and loved ones!

#### Whom do you know that is:

- Retired or close to retirement?
- Losing money in their investments?
- Worried about having a steady paycheck during retirement?
- Concerned about running out of money before they die?
- Fed-up with their current broker or advisor?
- Unsure what to do since their spouse passed away?

It's important that you understand, when you refer someone to us, we will provide them with exceptional service, just like we would for you. Furthermore, we will keep your information completely private, and will do the same with them. We don't want you or your referral to ever feel like they have to worry about that.

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