truenorth
FINANCIAL SERVICES, LLC

Growing Our Firm and Strengthening Our Capabilities

As a team of three passionate people with high standards, we are constantly looking for ways to improve the service we provide.   Our goal is to deliver the highest level of personal financial advice to you, and to make a real difference in your lives.

We've been asked alot lately whether we are taking new clients; the answer is yes, and will be so for the foreseeable future. Strengthening our capabilities requires regularly making new investments in technology, staff, and continuing education; that investment is funded primarily by growing our client base. We've been fortunate enough to have grown our firm via a strong network of referrals from professionals, primarily CPAs, and through referrals from our clients. It is client referrals that are most meaningful to us for several reasons.

When a client refers family, friends, or colleagues to us, we view it as the highest compliment and a statement of trust, and take on a special responsibility to live up to our client's expectations. When clients refer people who are in a similar life situation, we can leverage our knowledge of shared circumstances (professions, employer benefits, life stages, for example) and strengthen our capabilities around certain client groups. Finally, client referrals are particularly valued because when friends or family walk in the door, they start off with a higher level of trust in us based on your kind words.

Because referrals are so important to us, we have added two new steps to our client referral process:

- First, when you call or email us to let us know that you've referred a potential client to us, we'll mail you a Client Referral kit. This kit includes a letter from us as well as a brochure on working with a fee-only comprehensive financial advisor. The letter explains a little more about trueNorth, and the brochure covers topics such as what to expect from an advisor, the benefits of working with a fee-only advisor, and why working with a fiduciary advisor is important. The kit also provides the interested party with our contact information. We ask you to write your friend's name and address on the postage-paid envelope, and forward it to them.

- Second, when someone who has been referred by a client meets with us for the first time, we'll ask them if it is okay to send you a thank you note. In this way, we're sensitive to privacy issues, but can also close the loop with you if they become a client.

Karen, Joe and I love our work and our clients, and are excited about continuing to grow our firm and enhance our capabilities. Please let us know how we can improve what we do here – we always welcome your feedback.

Thanks again for the trust and confidence you place in us every day.

-- Therese Govern. Posted 08/15/07.