



BEAUPORT
FINANCIAL
SERVICES

WHERE CARE MEETS CRAFT™

WHO WOULD APPRECIATE MORE FINANCIAL CONFIDENCE?

You likely know someone who would be grateful to learn about Beauport Financial Services.
How can you tell?

WHO THEY ARE:

Successful individuals, families, and business owners like you—especially those either accumulating toward retirement or now living on that retirement income. They likely live or work in Essex County, Cape Ann, and the North Shore but could be further away.

WHAT THEY WANT:

They've saved and invested wisely but want more clarity to manage how everything ties together. They like the idea of a highly personalized financial blueprint so they can make smart decisions—about retirement, estate planning, investments, and giving back.

They will especially like us if they value philanthropy and want to magnify the impact of their giving so they can build a real legacy. And instead of a big institution, they prefer an independent team on their side—people not obligated to sell certain products.

HOW TO INTRODUCE US:

You don't need to know what someone's financial situation is—just that they're thoughtful about their future and open to a conversation. An introduction can happen a number of ways (and we have an email template you can use, too):

1. Suggest that they contact us and recommend they use your name as a reference. We'll respond in the method that's best for them.
2. You can mention to your friend that you'll have your contact at Beauport Financial send some information. Then just provide us with their contact information. We'll reach out with our brochure and a note mentioning you as our mutual friend, so they know it's not a cold call. The sole purpose is getting to know one another. If the timing is right and chemistry is good, we will mutually agree to have a future conversation.

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