NEXT PLAY WEALTH

Our Referral Philosophy

The strongest relationships are built on trust.

At Next Play Wealth, growth is not a marketing objective, it is the byproduct of meaningful work and long-term partnerships. When a client introduces us to someone they care about, it reflects confidence in the relationship we have built together.

A referral is not only an introduction, but also an extension of trust, and we treat it accordingly.

Who We Serve Best

We work best with individuals and families who value:

- Long-term partnership over short-term transactions.
- Structure and proactive planning.
- Coordinated tax and investment strategy.
- Open communication and mutual accountability.

We are not focused on volume.

We are focused on alignment.

Our Commitment to Those You Introduce

If you choose to introduce someone to us:

- They will be treated with respect and discretion.
- There will be no pressure or obligation.
- We will thoughtfully assess whether we are a good fit for each other.
- Their information will remain confidential regardless of either relationship with Next Play Wealth.

An introduction does not obligate anyone to move forward but is an opportunity to determine whether a meaningful relationship can begin.

How Introductions Work

There are two ways you may introduce someone:

1. A Warm Introduction
An email introduction is often the most effective approach; when making an introduction, please include the full name, phone number, and email address so we can follow up appropriately and respectfully.

2. Direct Outreach (With Permission)
If you prefer, you may provide us with their contact information and confirm that they are open to hearing from us; we will reach out thoughtfully and at an appropriate time.

We will never contact someone without your awareness or consent.

A Note of Gratitude
Being introduced to someone you trust is one of the highest compliments we can receive, and we do not take this lightly. Our responsibility is to reflect well on you, for having the trust and willingness to introduce us, so thank you.

Final Thought

Financial guidance is personal. It requires trust, alignment, and shared commitment.

If you know someone who would benefit from our structured, proactive approach to planning and long-term strategy, we welcome the opportunity to discuss if we are the right fit.