



SECOND OPINION

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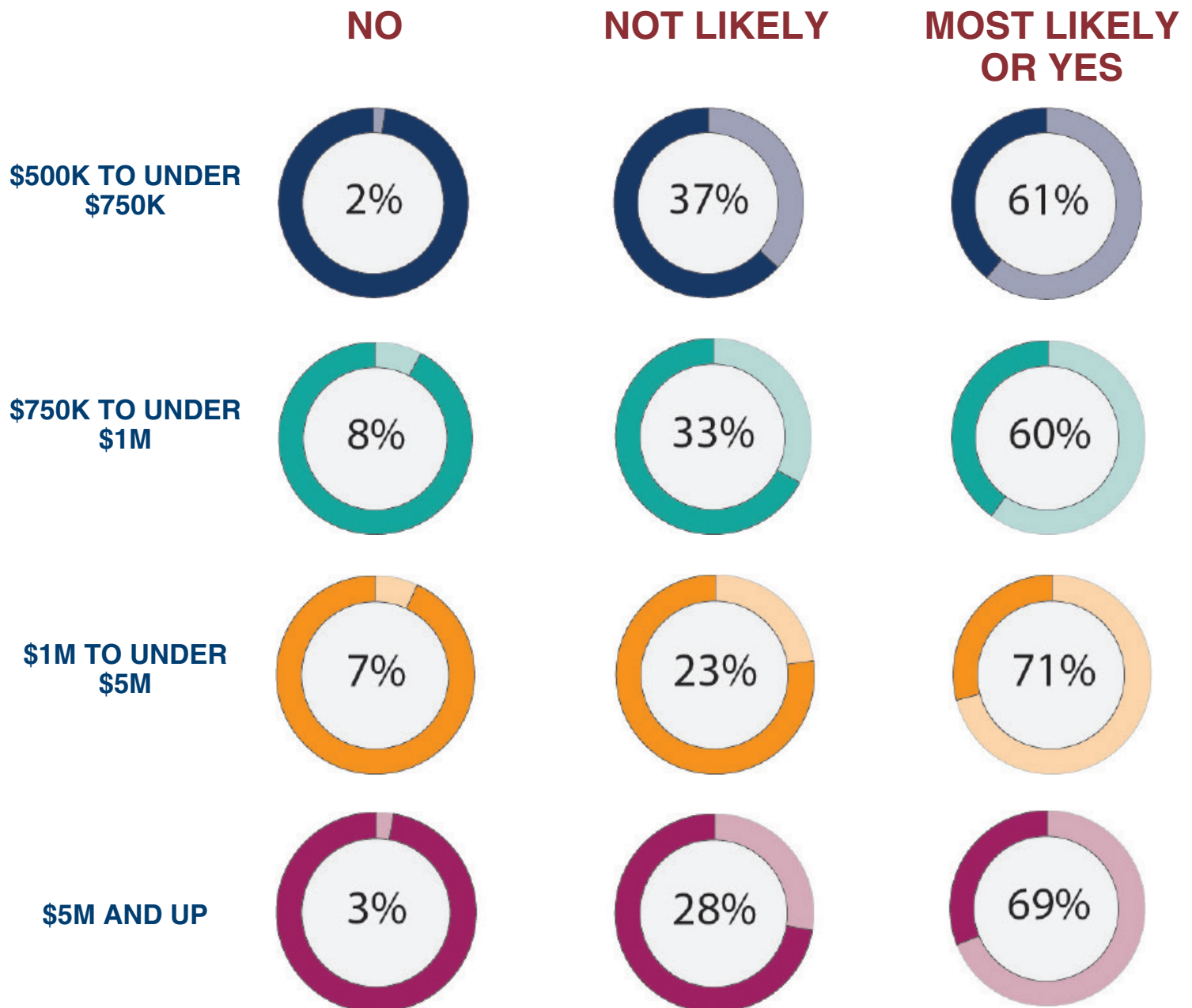
What Is A Second Opinion And How Do They Help?

A second opinion can be a successful prospecting strategy. The reason for its effectiveness is very simple; whenever an important decision needs to be made, we often seek out the advice of another person. We get a second opinion, several bids, comparative pricing, even seek additional medical advice. Why not do the same with investments?

Second Opinion Opportunities

It's simple; investors have been shaken up by the volatility in the markets and they are in need of a trusted financial professional to oversee their financial affairs. The research below indicates their willingness to accept a second opinion.

WOULD YOU ACCEPT A 2ND OPINION ON YOUR PORTFOLIO?



Source: The Oechsli Institute



What Are The Benefits Of A Second Opinion?

A good qualified investment professional will review the wealth of clients to help ensure a healthy balance. The good review will show the entire financial picture, rather than just one component. Evaluate debt, risk and portfolio strategizing and estate and tax planning with the ultimate goal of helping secure financial freedom for the client.

THE BASIC BENEFITS

- Greater financial confidence
- Fresh perspective
- Potentially revealing missed opportunities

WHAT TO LOOK FOR

- People who are discussing the market volatility we've seen over the last few years. They may be making comments on such things as:
 - o Government
 - o Healthcare reform
 - o Financial regulations
 - o Retirement concerns
- People making comments regarding concerns over the future of social security
- Clients who express concerns about saving for retirement

MOST LIKELY PROSPECTS

- In short, anyone who has money opportunities

POSITIONING STATEMENTS

(to be used after customer inquiry only)

- Have you had your portfolio reviewed recently?
- Have you had a second opinion on your family's finances lately-just to make sure that they are still on track?
- Would you like to meet with someone to review your current portfolio?

PLEASE LIST THE NAMES OF 5 CLIENTS THAT COULD BENEFIT FROM THIS PROGRAM:

Name

Phone #

1) _____

2) _____

3) _____

4) _____

5) _____
