



# BOSTIAN RETIREMENT PLANNING, LLC

## REFERRAL PROGRAM

*We believe that great things should be shared! That's why we're excited about our Referral Rewards Program, designed exclusively for our valued clients like you.*

### STEP 1: Make A Referral

How to Submit a Referral:

- Complete one of our referral cards in the lobby of our office.
- Visit our website ([www.bostianretirement.com](http://www.bostianretirement.com)) and navigate to the referral tab on our page to submit your referral.
- You may also call the office and our staff will complete the card for you.

### STEP 2: Meet With Advisor

Once a referral is made, Bostian Retirement Planning staff will qualify each referral and reach out to them to schedule an appointment to meet with us. You will have earned your incentive once they come into the office for a one-on-one appointment with one of our advisors.

### STEP 3: Track Your Success

**1st Referral** - \$50.00 Darden Gift Card. Enjoy a meal on us!

**2nd Referral** - Dynamic Foot Scan Evaluation and a pair of tennis shoes and orthotic insoles from Fleet Feet. We care about your health!

**3rd Referral** - Roadie 32 Wheeled Yeti Cooler. Keep your drinks and treats cool while adventuring with friends or visiting your kids and grandkids!

**4th Referral** - \$350.00 Amazon Gift Card! Treat yourself to something special.

**5th Referral** - Apple IPAD. Stay connected with your friends and family.

**6th Referral** - Choose your incentive. You may choose one of our previous incentive choices as our gift to you.



**1ST REFERRAL:  
\$50.00  
DARDEN  
GIFT CARD**

**2ND REFERRAL:  
FLEET FEET  
EXPERIENCE**



**3RD REFERRAL:  
YETI ROADIE  
ROLLING  
COOLER**

**4TH REFERRAL:  
\$350 AMAZON  
GIFT CARD**



**5TH REFERRAL:  
APPLE  
IPAD**

**6TH REFERRAL:  
CHOOSE YOUR  
INCENTIVE.  
SELECT ONE  
PREVIOUS  
INCENTIVE**

