



EMAIL SIGNATURES

LINKEDIN | CREATE MULTIPLE QUALIFIED SUSPECTS

Subject: Do you know these people?

NAME,

I hope this email finds you doing well.

Quick question - I was going to be reaching out to a few people who I have listed below because as you already know I do a great amount of work with OCCUPATION here in AREA. Before I reach out to anyone my team does a quick overview of their LinkedIn so we have a little bit more of an idea regarding their background. When I looked at their profiles, I noticed that the you were connected to each of these people, so I wanted to ask you...

- Do you know them well?
- If so, what would say is special about them?
- Would you have any objection when I reach out to them that I mention that the two of us know one another well and you thought we may enjoy an introduction?

Individuals I have in my system and am planning on reaching out to:

- NAME
- NAME
- NAME

Thanks, brother!

Dave

PS – SEND A BRIEF PERSONAL MESSAGE HERE (PEOPLE ALWAYS READ THE PS LINE!)



EMAIL SIGNATURES

LINKEDIN | INTRODUCTORY NOTE

Subject: Introductory Note

NAME,

Thanks for the feedback. I'll be sure to mention we know one another when I reach out.

I'm sure you can imagine, people are typically more receptive to my phone call when they hear in advance from you that the two of us do in fact know one another well and that you think we would enjoy meeting. Any chance you'd mind copying the note below and shooting it to them via email?

PS – feel free to scratch this and say something different or adjust the wording in any way you feel appropriate.

NAME,

I hope all is well in your world. I thought of you today, and I wanted to introduce you and Dave Resseguie. Dave is with COMPANY here in AREA. I asked him to call you as I think the two of you would really benefit from meeting one another.

I assume that you have a number of relationships with people in the financial arena, and I am sure you have already done some financial planning. That said, Dave shared some ideas with me that I think you, as well, will find to be particularly interesting and relevant.

I've copied Dave on this email. Either he or someone from his team is going to be reaching out in the next few days. Clearly, there is no obligation on your part to meet. I think you would at least enjoy an introduction.

Also, I just shared his contact info with you. It might be a good idea to save it in your phone that way you'll know it's him when he reaches out.

Hopefully you get the chance to connect! Have a great day!

NAME

Thanks again, and have a great day!

Dave

Step 1

The screenshot shows the LinkedIn homepage. At the top, there is a navigation bar with icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Learning. Below this is a search bar and a banner for "Looking for Board Roles?". The main content area features a post by Jarrett Engel, liked by Joy Avedesian, CLTC. The post text asks, "What will happen to your practice if something unexpectedly happens to you? Many financial professionals can't answer that question. MassMutual is taking the guesswork out of that equation. Learn more here." The post includes a video thumbnail of Michael Book, CLU, ChFC, CLTC, General Agent at Fifth Avenue Financial, and a web link to players.brightcove.net. On the left, there is a profile card for Dave Resseguie, Founder & Chief Shepherd of The Resseguie Group. On the right, there are sections for "LinkedIn News" with articles like "Here's who's hiring right now" and "A new job title emerges in crisis", a "Promoted" section for FIU Business, and an "Add to your feed" section for #innovation.

Step 2

This screenshot shows the LinkedIn search dropdown menu. The search bar at the top contains the text "Search". Below it, a dropdown menu is open, displaying search filters: "People", "Jobs", "Content", "Companies", "Schools", "Groups", and "Events". Under the "Try searching for" section, three search suggestions are listed: "covid", "world health organization", and "coronavirus impact". The background of the page is dimmed, showing the same LinkedIn homepage content as in Step 1.

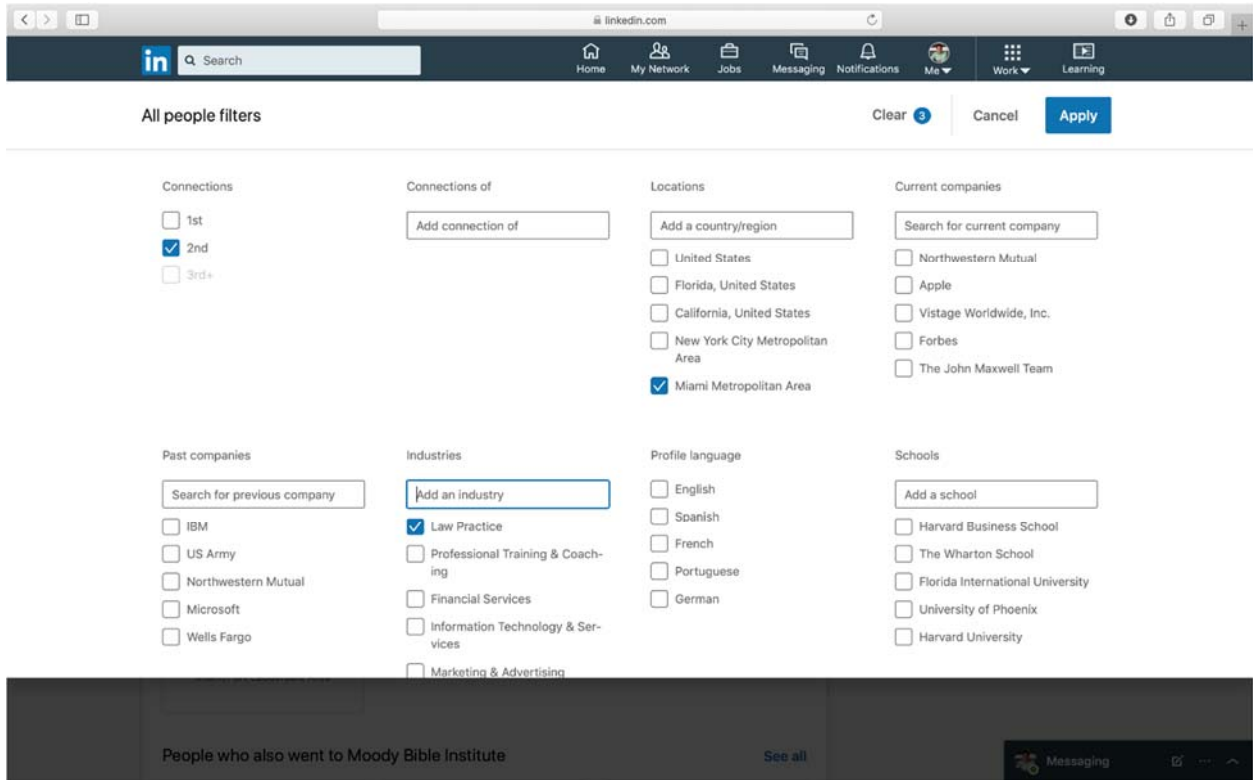
Step 3

The screenshot shows a LinkedIn search results page for the query "Looking for Board Roles?". The page features a navigation bar at the top with search filters for "People", "Connections", "Current companies", and "Locations". Below the navigation bar, there are three main sections: "My connections" with three profile cards for Jesse Bouchard, Rob Poleo, and Lizbeth Nunez; "People at The Resseguie Group" featuring Dave Resseguie; and "People who also went to Moody Bible Institute". On the right side, there are two promoted ads: "Looking for Board Roles?" and "FIU 1-year MS in Finance". A "Messaging" button is visible in the bottom right corner.

Step 4

The screenshot displays the "All people filters" section of the LinkedIn search interface. It includes a "Clear" button, a "Cancel" button, and a blue "Apply" button. The filters are organized into four columns: "Connections" (1st, 2nd, 3rd+), "Connections of" (Add connection of), "Locations" (United States, Florida, California, New York City, Miami), "Current companies" (Northwestern Mutual, Apple, Vistage Worldwide, Forbes, The John Maxwell Team), "Past companies" (IBM, US Army, Northwestern Mutual, Microsoft, Wells Fargo), "Industries" (Professional Training & Coaching, Financial Services, Information Technology & Services, Marketing & Advertising, Staffing & Recruiting), "Profile language" (English, Spanish, French, Portuguese, German), and "Schools" (Harvard Business School, The Wharton School, Florida International University, University of Phoenix, Harvard University). At the bottom, there is a "People who also went to Moody Bible Institute" section with a "See all" link and a "Messaging" button.

Step 5

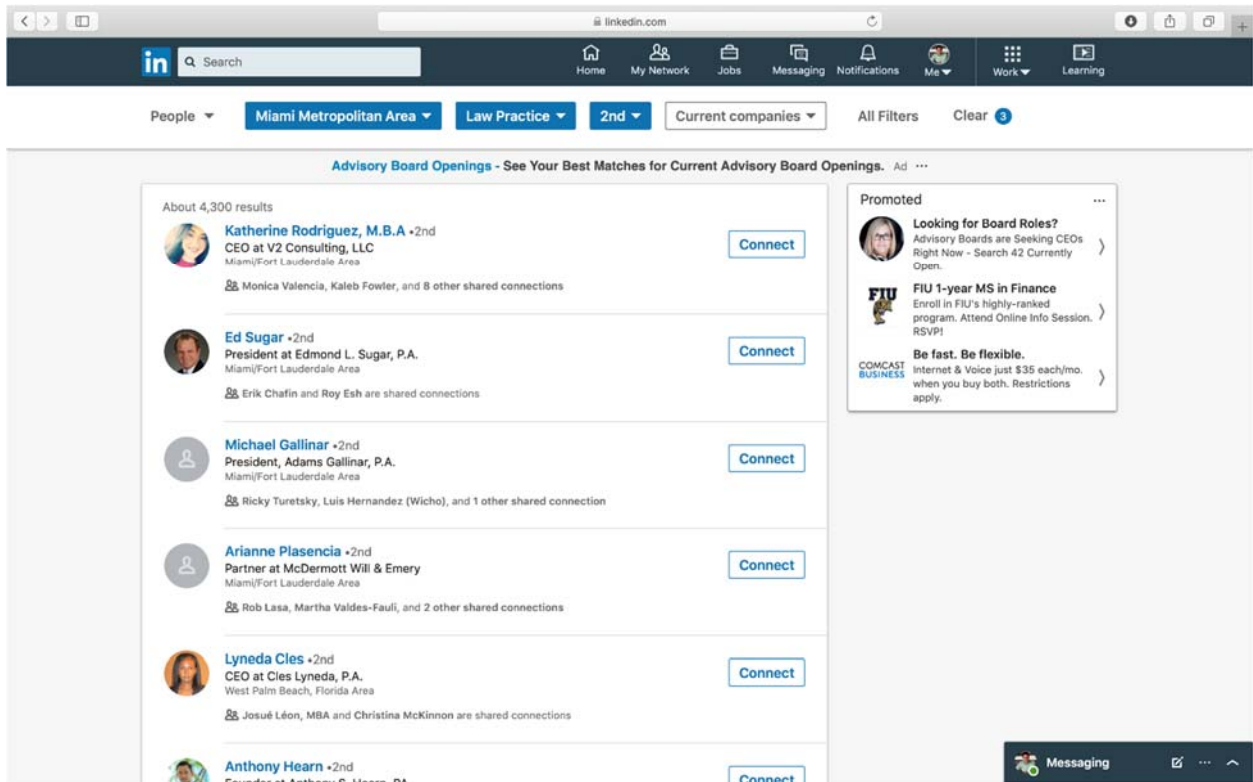


The screenshot shows the LinkedIn search filters page. At the top, there is a navigation bar with icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Learning. Below the navigation bar, the search bar is visible. The main content area is titled "All people filters" and includes several filter categories:

- Connections:** Radio buttons for 1st, 2nd (selected), and 3rd+.
- Connections of:** A text input field labeled "Add connection of".
- Locations:** Checkboxes for United States, Florida, United States, California, United States, New York City Metropolitan Area, and Miami Metropolitan Area (selected).
- Current companies:** A text input field labeled "Search for current company" and checkboxes for Northwestern Mutual, Apple, Vistage Worldwide, Inc., Forbes, and The John Maxwell Team.
- Past companies:** A text input field labeled "Search for previous company" and checkboxes for IBM, US Army, Northwestern Mutual, Microsoft, and Wells Fargo.
- Industries:** A text input field labeled "Add an industry" and checkboxes for Law Practice (selected), Professional Training & Coaching, Financial Services, Information Technology & Services, and Marketing & Advertising.
- Profile language:** Checkboxes for English, Spanish, French, Portuguese, and German.
- Schools:** A text input field labeled "Add a school" and checkboxes for Harvard Business School, The Wharton School, Florida International University, University of Phoenix, and Harvard University.

At the bottom of the filter section, there is a dark bar with the text "People who also went to Moody Bible Institute" and a "See all" link. A "Messaging" button is also visible in the bottom right corner.

Step 6



The screenshot shows the LinkedIn search results page. At the top, there is a navigation bar with icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Learning. Below the navigation bar, the search bar is visible. The main content area is titled "People" and includes several filter buttons: Miami Metropolitan Area, Law Practice, 2nd, and Current companies. There are also "All Filters" and "Clear" buttons.

The search results are displayed in a list format. The first result is for Katherine Rodriguez, M.B.A., CEO at V2 Consulting, LLC. The second result is for Ed Sugar, President at Edmond L. Sugar, P.A. The third result is for Michael Gallinar, President, Adams Gallinar, P.A. The fourth result is for Arianne Plasencia, Partner at McDermott Will & Emery. The fifth result is for Lyneda Cles, CEO at Cles Lyneda, P.A. The sixth result is for Anthony Hearn, Founder at Anthony S. Hearn, P.A.

On the right side of the page, there is a "Promoted" section with three advertisements:

- Looking for Board Roles?** Advisory Boards are Seeking CEOs Right Now - Search 42 Currently Open.
- FIU 1-year MS in Finance** Enroll in FIU's highly-ranked program. Attend Online Info Session. RSVP!
- Be fast. Be flexible.** Internet & Voice just \$35 each/mo. when you buy both. Restrictions apply.

At the bottom of the page, there is a "Messaging" button in the bottom right corner.

Step 7

Step 7 shows the LinkedIn 'All people filters' page. The filters are:

- Connections:** 1st, 2nd, 3rd+
- Connections of:** Add connection of
- Locations:** Miami Metropolitan Area, United States, Florida, United States, Miami, Florida, United States, Fort Lauderdale, Florida, United States
- Current companies:** Akerman LLP, Greenberg Traurig, LLP, Bilzin Sumberg, Holland & Knight LLP, Cole, Scott & Kissane, P.A.
- Past companies:** Search for previous company; Greenberg Traurig, LLP, Bilzin Sumberg, Akerman LLP, Holland & Knight LLP, University of Miami School of Law
- Industries:** Law Practice, Legal Services, Financial Services, Entertainment, Real Estate
- Profile language:** English, Spanish
- Schools:** University of Miami School of Law, University of Florida, University of Florida - Fredric G. Levin College of Law, University of Miami, Florida International University

Step 8

Step 8 shows the LinkedIn search results for the query "Looking for Board Roles? - Advisory Boards are Seeking CEOs Right Now - Search 42 Currently Open". The search filters are:

- People
- Past companies (4)
- Miami Metropolitan Area
- Law Practice
- 2nd
- Schools (2)
- All Filters
- Clear

The results list 84 people, including:

- Ilana Gorenstein Tabacnic** •2nd, Partner at Akerman LLP, Miami/Fort Lauderdale Area. [Connect](#)
- Mildred Gomez** •2nd, Partner at Bilzin Sumberg, Miami/Fort Lauderdale Area. [Connect](#)
- Julie Blackmore** •2nd, Associate at Greenberg Traurig, LLP, Miami/Fort Lauderdale Area. [Connect](#)
- Cory Eichhorn** •2nd, Partner at Holland & Knight LLP, Miami/Fort Lauderdale Area. [Connect](#)
- Joshua Levenson** •2nd, Partner at Holland & Knight LLP, Miami/Fort Lauderdale Area. [Connect](#)
- Michelle Gonzalez** •2nd, Partner at Akerman LLP, Miami/Fort Lauderdale Area. [Connect](#)

A promoted advertisement for Comcast Business is visible on the right side of the page.

Step 9

The screenshot shows a LinkedIn search results page. The browser address bar displays 'linkedin.com'. The navigation bar includes icons for Home, My Network, Jobs, Messaging, Notifications, Me, Work, and Learning. The search bar contains the text 'Search'. The main content area shows 11 search results for the location 'Miami/Fort Lauderdale Area'. Each result includes a profile picture, name, title, and a 'Message' button. The results are as follows:

- Michael Hochman** •1st
Life and Disability Brokerage Manager at National Planning Corporation
Miami/Fort Lauderdale Area
Matthew Paul, Olajuwon Jones, and 200 other shared connections
- Matt Sarelson** •1st
Founder and Partner at Sarelson & Co. - Attorneys and Advisors
Miami/Fort Lauderdale Area
Grant Miller, Eduardo Padrón, and 70 other shared connections
- Howard Wolkowitz** •1st
We all have a rainmaker inside of us.
Miami/Fort Lauderdale Area
Dingshi Wang, Grant Miller, and 88 other shared connections
- Brett Trembly** •1st
Inc. 5000, 10-Attorney Business Law Firm for Employers. Business, Franchise, Trad...
Miami, Florida, United States
Provides services - Corporate Law, Business Law, Labor and Employment Law, Trademark L...
- Ariel Saban** •1st
Partner at Saban and Solomon Law Firm
Miami/Fort Lauderdale Area
Grant Miller, Moshe Popack, and 48 other shared connections
- James Sammataro** •1st
Co-Chair of Media and Entertainment Group
Miami/Fort Lauderdale Area
Eduardo Padrón, Executive Roundtable, and 13 other shared connections
- Angelina Perez** •1st

On the right side, there is a 'Promoted' section with two advertisements:

- Advisory Board Openings**
See Your Best Matches for Current Advisory Board Openings.
[Learn more](#)
- FIU 1-year MS in Finance**
Enroll in FIU's highly-ranked program. Attend Online Info Session. RSVP!
[Learn more](#)

A 'Messaging' button is visible in the bottom right corner of the page.