

# SIX GREAT OPPORTUNITIES TO USE AN OFFICE MOVE TO CATAPULT YEAR END GROWTH



## THE GOOD LIFE

By Merra Lee Moffitt, AWMA, CMFC, CFP®, Senior Partner, Wealth Strategist, Good Life Financial Group

By now, the kids are back in school, Summer vacations are over, and you have four months to make your business shine to the end of the year. We here at Goodlife just moved our offices, which vastly disrupted business for most of the Summer. On the other hand, our move provided some great catalysts for building business through the end of the year. Using the new positive energy and progress people perceive through our beautiful remodeled building, we have opportunities to remind and reinforce what great partners we are in helping with your financial life.

Here's a list of the six catalysts I've been working on to propel my business through the end of the year. Even if you are not moving, you may find a few ideas that could work for you.

**Scheduled a 'Sneak Peak' Open House** — Before the landscaping arrived, the parking lot lines painted, and the installation of signage, I scheduled a sneak peek for my clients and business-owner friends to see and mingle among themselves throughout the evening. I believe they appreciated being the first group into the building and it provided us with a great dry run for the Grand Opening on September 13th. Hint, this is an invite. Stop in on September 13 and you'll be amazed how we're using our space to help the community.

**Checked in with my clients** — The move is a great excuse to call many clients to announce the move, introduce my

newest team member, invite them in for a financial review and offer them a 'private' tour of our new building. Many clients came into the office and we uncovered ways to improve their retirement readiness.

**Cleaned up my mailing/emailing list** — It's been a couple years since I regularly scheduled and invited my small business clients and friends to meet other like-minded people looking for prospects, clients, and other ways to work together. Since we mail our clients, we uncovered addresses that were wrong in parts of our back-end system. When we emailed for the event, we scrutinized through our email list to remove people who moved, changed company names, or otherwise changed email addresses. We also added people we recently met who would appreciate invitations to networking events.

(Continued on page 53)

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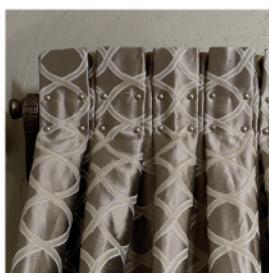


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## THE GOOD LIFE

(Continued from page 51)

### Formed new strategic partnerships —

In our new building, we have a huge beautiful lobby and two training rooms available for non-profit meetings, networking mixers, up to 50-person training classes and other events. Our space just begs to be used for the community of small-business owners and non-profits. I've formed alliances with Entrepreneurs' Connection so they can have a space to hold monthly mixers and meet-n-greets where both they and I will meet a multitude of new people to build our connectivity, prospect, and client lists. In addition, we'll be hosting the Business Owners Trade Alliance (BOTA) Holiday Showcase.

### Learned new social media skills —

For the first time, we tried Facebook Events and saw how people could respond easily even if they were not on our email list, as well as alternatively easily responding to an email invite.

### Following up —

For the next several weeks, I'll be following up with people who mentioned they would like to meet about their finances, chat about using our community friendly space, or just chat about working together. I'm confident new opportunities will emerge.

I am totally looking forward to the results brought about by our office move and how I can help others grow business into year end. Call me for a chat about what you can do to grow your business. You don't need to move to create a catalyst for growth.

*Merra Lee Moffitt, Certified Financial Planner, is a Senior Partner at Good Life Financial Group, Shillington. First and foremost, she is a financial educator. In her 19 years as a professional financial planner, she has created over 384 written financial plans for families and business owners. If you want the kind of caring, thoughtful, and educated financial planning she can bring, call, click or come by at 610.488.7353, [www.MerraLee.net](http://www.MerraLee.net), or 2395 Lancaster Pike, Reading, PA 19607.*

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# Business Planning Have You PUZZLED?



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## Three "Interesting" Tactics for Financial Dynamics:

- 1) Let the additional income from new projects be used for 401k, Roth or retirement plans.
- 2) Use interesting ways to help slow paying customers.
- 3) Pay off the smallest debt first.



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