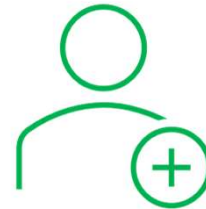




Let's talk  
about  
Referrals

# Guidelines

✓ Know your member



✓ Confirm with them before proceeding



✓ Follow up





Making a Referral

## DFK Recent Referral



Ryan Dudley  
Friedman LLP  
New York, USA



Michel Jaggi  
Fidinter  
Zurich, Switzerland



**Ryan Dudley** - We had an urgent query (NY time) from a client attempting to close their books for the end of May today. They needed Swiss VAT advice urgently. Despite travelling and it being very late in Europe, Michel Jaggi took the call with the client, and promptly resolved their issue.

Michel and I have participated in the International Tax Committee together and attended DFK conferences together for over a decade. Those relationships are invaluable."

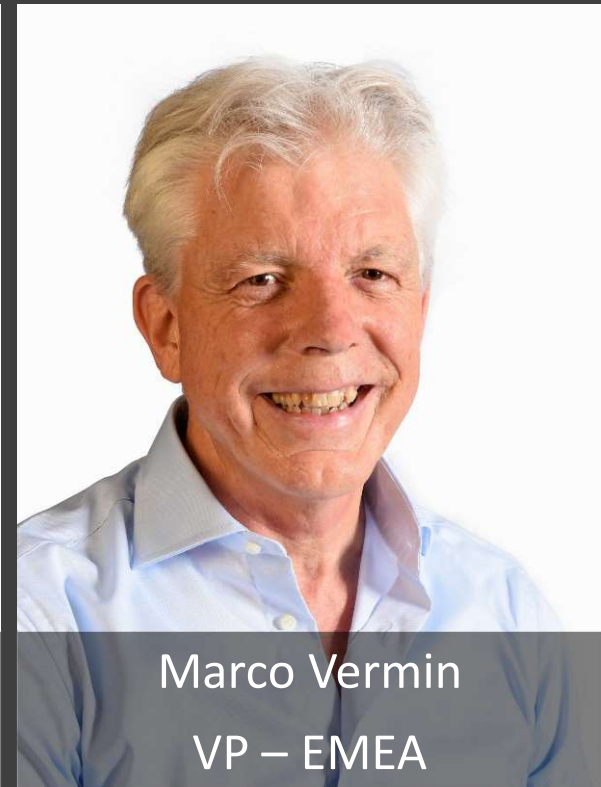
**Michel Jaggi** - "I was happy supporting Ryan, *because we know each other for such a long time.* DFK service is better than the big four!

*This is because of personal relationships.*

I was told this when Fidinter joined DFK and I have experienced this responsiveness several times."

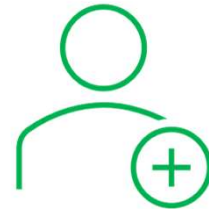


# Referrals in Action



# Referral Guidelines

✓ Know your member



✓ Confirm with them before proceeding



✓ Follow up



Successful referrals = great client relationships



Thank you!