

# ONE FOR ALL COLLABORATION FRAMEWORK

## A THOUGHTFUL GUIDE TO REFERRAL PARTNERSHIPS



### Our Shared Mission

At Searcy Financial Services, we believe success isn't a solo journey. As highlighted in *One For All*, the most meaningful growth, personal, professional, and communal, comes when we intentionally support one another.

This framework is designed to spark meaningful conversations with professionals who share our values. It's not about contracts or commitments. It's about thinking through how we can best collaborate with generosity, trust, and purpose.

### Conversation Starters for a Stronger Relationship

Use these prompts to guide your dialogue as you explore how to build a mutually beneficial partnership:

#### 1. Who do we serve and where do we overlap?

Explore how your services complement one another. Who are the individuals, families, or organizations that would benefit from both of your work?

#### 2. What are our expectations and boundaries?

Talk through how you each prefer to operate. What are your expectations for professionalism, communication, and referral handling? What would make this relationship feel effortless and respectful?

#### 3. How often should we meet or connect?

Decide what cadence works best for check-ins, coffee catch-ups, or brainstorming sessions. Quarterly? Monthly? Twice a year?

#### 4. How can I invest in you—and how can you invest in me?

Think beyond referrals. Can you nominate each other for awards? Share insights or tools? Highlight each other's work publicly? Host joint events? A thoughtful investment in the relationship can take many forms.

#### 5. How will we follow up and follow through?

Discuss how you'll keep promises, deliver introductions, and close the loop. Consistency and clarity build trust.

## 6. How will we amplify each other's impact?

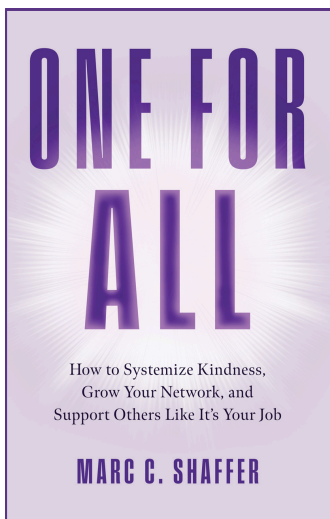
Identify creative ways to support one another (social media shoutouts, collaborative projects, or inclusion in newsletters and podcasts).

### Our Guiding Principles

As you build this partnership, consider reflecting on these values together:

- Show up with generosity and intention.
- Seek mutual wins and shared growth.
- Connect human-to-human, with curiosity and care.
- Follow up and follow through. Honor your word.
- Build trust with consistency.
- Elevate others and celebrate wins together.

### Inspired by the One For All Mindset



Kindness isn't just an act, it's a system.

We hear a lot about random acts of kindness, and those are great! But what if kindness wasn't random at all? What if we could build a world where generosity, connection, and support were intentional - woven into how we show up every day?

Drawing from over two decades of community-building, Marc has developed a **5-step process** for making kindness, networking, and meaningful relationships second nature - no guesswork, no randomness, just real impact. For more resources, visit

<https://searcyfinancial.com/oneforall>

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