How to Fill Out the MBX Referral Form

MBX   DATE Today's Date

From John Doe

To Bob Smith

Person or Company Fred at XYZ Company

Phone # (209) 456-1234

Information

Call after 2:30. Tuesday is best day.

John.smith@yahoo.com

123 Any Street, City, California

Referral

Member Meeting

Impact Meeting

Closed Business

$ 500

"From" is your own name. "Date" refers to the current meeting.

"To" is the name of the person to whom you are making the referral or with whom you met or did business.

"Person/Company" is the name of the referral you are making.

"Information" is needed contact information.

The description of this transaction should be circled and ONLY the white copy placed in the referral basket.

"Closed business" should indicate the amount of money generated by the transaction. The person performing the business transaction should fill this out, NOT the one giving the referral.