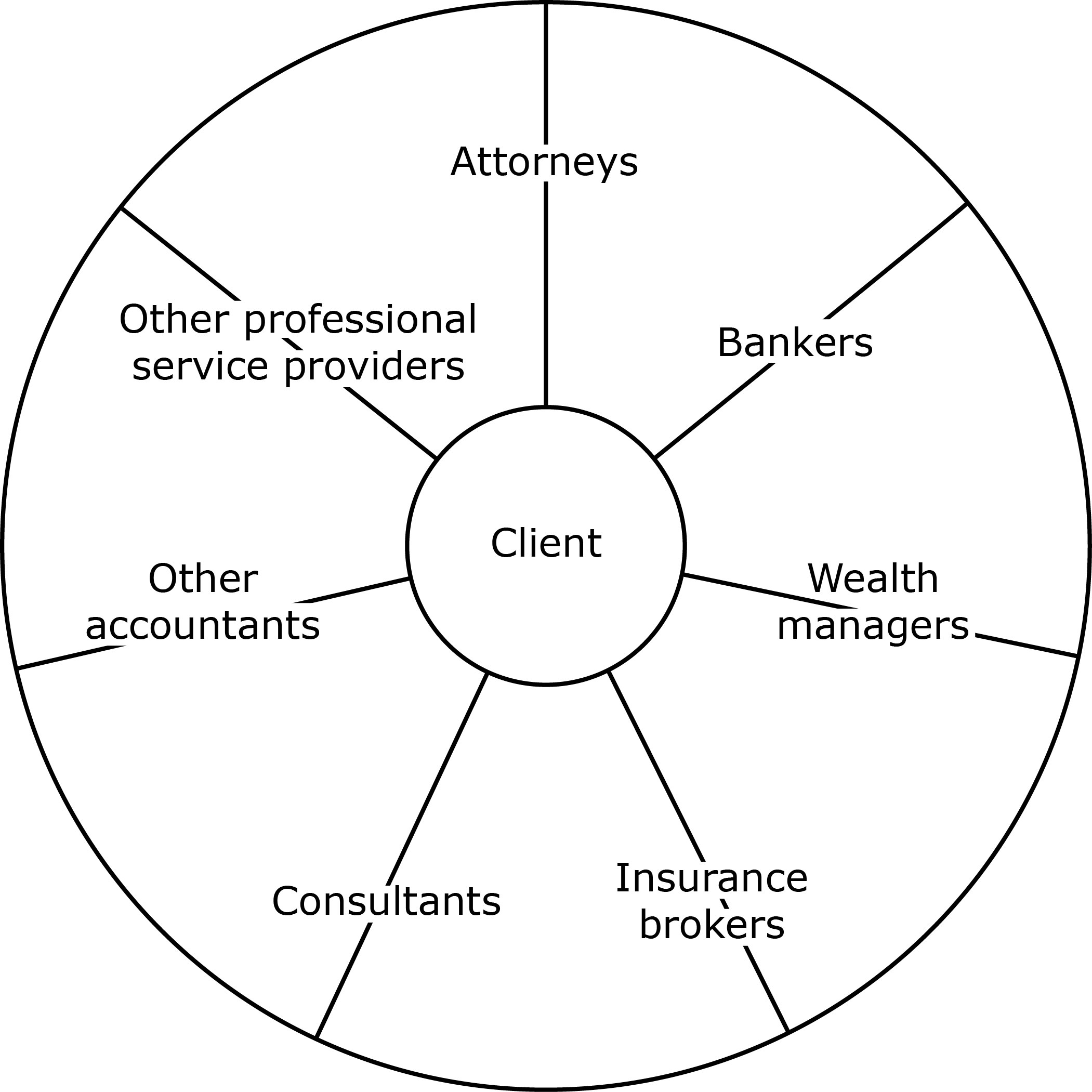
|  |  |
| --- | --- |
|  | Wheel of influence map |

|  |  |
| --- | --- |
| **Client name:** |  |



**Note:** A sample is included in the “Attorneys” table, below. Please type your information over this sample:

Attorneys

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** | Estate attorney | **Name** | John Phillips |
| **Firm** | Crossman, Jones & Phillips | | |
| **Phone** | XXX-123-4567 | **Email** | jphillips@cjpllp.com |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** | Business Attorney | **Name** | Ted Hagerman |
| **Firm** | Hagerman, Pearl & Christophe | | |
| **Phone** | XXX-456-7891 | **Email** | tedh@hpcllp.com |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** | Litigation Attorney | **Name** | Jonathan Pearl |
| **Firm** | Hagerman, Pearl & Christophe | | |
| **Phone** | XXX-456-7891 | **Email** | jonathanp@hpcllp.com |

Bankers

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

Wealth managers

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

Insurance brokers

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

Consultants

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

Other accountants

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

Other professional service providers

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Type** |  | **Name** |  |
| **Firm** |  | | |
| **Phone** |  | **Email** |  |