

Centers of Influence (COIs) fact sheet

A guide to the categories and types of COIs that can help grow your business

Working with COIs is an opportunity to add greater value to your clients and form beneficial partnerships with businesses. Relationships with a diverse set of COIs can help you add greater value to your clients by helping them achieve goals and peace of mind. Consider the following life events, and the type of contacts who could add value through those experiences:

Owning, buying or selling property

- Real estate attorney
- Real estate agent
- Insurance agent
- Tax advisor
- Home inspector
- Home staging service
- Downsizing consultant
- Landscaping
- Specialists (carpenter, electrician, plumber, painter, etc.)
- Pest control
- Property management

Maintaining physical and mental health

- Counselor or therapist
- Life coach
- Fitness coach
- Dietitian
- Nutritionist
- Personal trainer
- Fitness studios
- Physical therapist

Providing elder care

- Transportation service
- Cleaning service
- Caregiver
- Physical therapist
- Personal trainer
- Nutritionist
- Home accessibility consulting
- Geriatrician
- Nursing home

Preventing fraud

- Private security company
- Credit bureau
- Law enforcement agency
- Social Security administration
- Financial institutions
- Cyber security providers

Buying or selling a business

- Valuation consultant
- Commercial real estate agent
- Marketing consultant
- Accountant
- Attorney
- Investors

Caring for children

- Childcare provider
- Day care centers
- Summer camp and educational program providers
- Tutoring service
- Pediatric specialists (dentist, therapist and/or counselor, optometrist, pediatrician, etc.)
- Little league sports associations
- Dance and gymnastic studios
- Music teachers
- Private education admissions advisor

Death of a loved one

- Funeral home
- Charitable organizations
- Grief counselor
- Estate attorney

Pursuing and financing education

- College advisor
- College admission centers
- Standardized test tutor (SAT, ACT, GMAT, LSAT, MCAT, etc.)
- Career coach
- Student loan officer
- Professional recruiter

Travel

- Travel agent
- Travel medical insurance provider
- Property caretaker
- Pet hotels
- Tour companies
- Property caretaker

Charitable giving

- Charitable organizations
- Tax and accounting services
- Donor-advised fund programs
- Philanthropic consultant

Getting married

- Wedding planner
- Prenuptial attorney
- Local wedding venues
- Photographer
- Florist
- Caterer

Getting divorced

- Divorce attorney
- Real estate attorney
- Family counselor
- Accountant
- Property caretaker
- Childcare providers
- Pet sitter

Estate planning

- Estate planning attorney
- Tax advisor
- Family counselors

Changing career or starting a business

- Professional recruiter
- Career coach
- Incubators
- Personal loan provider
- Private healthcare providers
- Relocation services
- Business incubators

Lifestyle services

- Event planner
- Personal shopper or stylist
- Chauffeur service
- Private jet and helicopter service
- Courier service
- Personal assistant



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