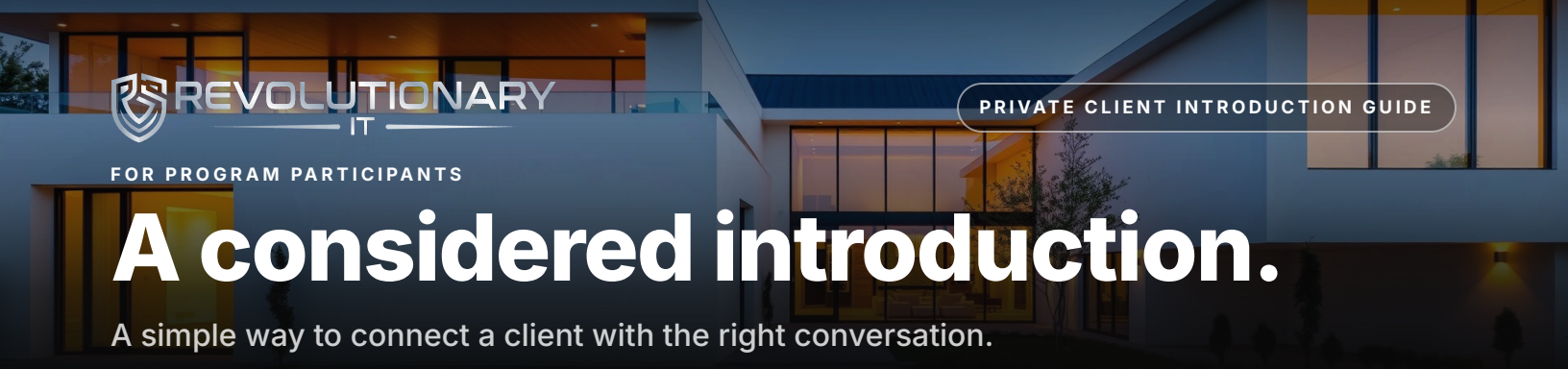


REVOLUTIONARY IT

PRIVATE CLIENT INTRODUCTION GUIDE

FOR PROGRAM PARTICIPANTS

A considered introduction.

A simple way to connect a client with the right conversation.

For trusted advisors serving family offices, principals and private clients. Use this guide when a client's technology or security needs come up, and connect them directly with our team.

SIGNALS

When an introduction helps

Fragmented providers
Several IT, security, networking or camera vendors, and no single party accountable for the whole environment.

A move or a build
Buying, building or renovating a residence, or opening or relocating a family office.

Home and business overlap
Office, household and remote-property systems that depend on each other.

Sensitive access
Household staff or outside vendors with access to sensitive systems.

A security concern
A suspicious email, an impersonation or fraud attempt, an account takeover, an exposed home device or a new concern about privacy or personal security.

A higher standard of support
More consistent support, surveillance, access control, networking or remote-property visibility.

> Or simply when a client asks, "Do you know someone who can handle this?"

THE PROCESS

Three steps

1. **Ask permission**
   Confirm the client would welcome an introduction, and how they prefer to be contacted.
2. **Make the introduction**
   A short email, call or conversation is enough. Use one of the scripts on the next page.
3. **Step back**
   David arranges a 30-minute discovery, then a private review of devices, accounts and networks, and, with the client's permission, can keep you informed.

PRIVACY

Keep it private

Keep credentials, account numbers, financial details and security configurations out of the introduction. Those belong in a private discussion, not an open email or web form.

Ready-to-use introductions.

Adapt the words to your own voice. Always ask the client first.

Email introduction

To: david.pitts@revolutionaryit.com
Cc: **[Client]**
Subject: Introduction: **[Client]** and David Pitts

David, with **[Client]**'s permission, I'd like to connect you because **[brief reason]**. **[Client]**, David and his team at Revolutionary IT provide private IT, cybersecurity and security infrastructure, and they work alongside existing providers. I'll let you take the conversation from here.

In person

There's a Dallas firm called Revolutionary IT that I think you should know. They handle private technology, cybersecurity and security infrastructure for family offices and private clients, and they are accountable for the whole environment. If you'd like, I can introduce you.

By phone

I wanted to mention Revolutionary IT, a Dallas firm that looks after private technology, cybersecurity and security infrastructure for family offices and private clients. If it would help, I'm happy to introduce you.

Short version

I know a Dallas firm, Revolutionary IT, that acts as one accountable technology partner for family offices and private clients. Happy to introduce you.

> Paid introductions: 15% of collected recurring monthly service revenue, or a one-time fee, under a signed Private Client Introduction Agreement. Where your rules require it, disclose compensation to the client in writing before you introduce them. Advisors who cannot accept compensation can still introduce.

AFTER YOU INTRODUCE

What happens next

A discovery discussion

David confirms the need and the providers involved, then arranges a private technology review that ends in a plain list of where coordination would help. It is a conversation, not a service engagement.

Existing providers stay

Current IT, security and residential technology providers can remain part of the picture. The aim is clearer ownership, not replacing anyone.

Every answer respected

If the client declines or wants to pause, that decision and its scope are respected. Nothing proceeds without their agreement.

Questions about making an introduction? Book a 30-minute discovery discussion with David, or call either number.



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Book a 30-minute discovery discussion