

SANDRA GILPATRICK FINANCIAL PROMO VIDEO

Written by

Nick Iandolo

(Approved by Sandra Gilpatrick)

Nick Iandolo, Producer  
20 Heritage Hill  
Dedham, MA 02026  
617.899.7275  
nick@tenthsphere.com

Final Draft  
September 25, 2014

© 2014 Nicholas Iandolo

FADE IN:

MAIN TITLE - BRIEF IMAGE OF SANDRA GILPATRICK LOGO

MUSIC CUE: DREAM DANCES BY NIKMUSIC, POND5.COM

DISSOLVE TO:

INT. PRESIDENTS ROOM - ST. BOTOLPH CLUB - BOSTON - DAY

SANDRA GILPATRICK, sophisticated, beautiful, very professional, sits and smiles. The room is a classic Bostonian design, formal and elegant. This location features Sandra in a wide shot with a fireplace behind her.

SANDRA

I've been asked why I use a lily of the valley for my logo. My grandmother's favorite flower was the lily of the valley.

INSERT - IMAGE OF SANDRA'S GRANDPARENTS

SANDRA (V.O.) (CONT'D)

She was a well-known Miami Beach resident, an author, and active in the city.

INSERT - IMAGE OF SANDRA'S GRANDMOTHER ONLY

SANDRA (V.O.) (CONT'D)

When my grandfather died, she didn't know the first thing about managing her wealth. She didn't even know how to write a check.

BACK TO SANDRA

SANDRA (CONT'D)

Seeing my grandmother and so many other bright women in my life in need of financial literacy fueled my passion: to make sure women know what to do to take care of themselves financially.

(MORE)

SANDRA (CONT'D)  
I am different than the typical  
financial advisor. To start, I'm  
fully transparent about how I'm  
compensated.

INSERT - ESG SLIDE

SANDRA (V.O.) (CONT'D)  
I'm concerned about Environmental,  
Social and Governance criteria as a  
component of my clients'  
portfolios ...

BACK TO SANDRA

SANDRA (CONT'D)  
... to help align my clients'  
values with their money. I decided  
to start my own practice.

SUPER: WWW.SANDRAGILPATRICK.COM

FADE TO:

INT. HOTEL BALLROOM - CONTINUOUS

Sandra conducts a presentation in front of an audience MOS.

SANDRA (V.O.) (CONT'D)  
I didn't want to shut out younger  
clients who have less than one  
million dollars to invest. For  
example, I met a single woman at a  
mutual friend's wedding as she  
was moving to Boston for a new job.  
She is entrepreneurial, hard  
working, an excellent saver. She  
had already accumulated more than  
one hundred and twenty thousand  
dollars in investable funds at the  
age of thirty-one.

CUT TO:

EXT. COMMONWEALTH AVENUE MALL - BOSTON - DAY - CONTINUOUS

Sandra walks along the mall for a moment, sits at a bench,  
reviews files, looks up and smiles MOS.

SANDRA (V.O.) (CONT'D)  
She wanted to discuss: life goals,  
budget, previous employers  
retirement plans, credit and cash  
reserve.

INSERT - IMAGES OF THE AFOREMENTIONED LIFE GOALS

CUT TO:

INT. GREEN ATLANTIC ROOM - ST. BOTOLPH CLUB - DAY -  
CONTINUOUS

MUSIC CUE: CHANGE OF MUSIC, TBD

Sandra sits in another yet equally as elegant room as the Presidents Room at the St. Botolph Club in Boston. This location features a mid-to-close up on Sandra with possibly a computer next to her -- as if she's working.

SANDRA  
We both enjoy cooking and it is always a pleasure to pick up the phone share a recipe, answer her financial questions, and hear about what's new in her life. Another example of clients I enjoy helping are my Generation-X friends. Some of them need help learning how to deal with inheritance proceeds, others with the educational needs of young children, their desire to travel more, or early retirement. I enjoy providing these friends with a personalized finance plan in pursuit of their goals, while addressing their needs, including insurance. When I take on a client, it is important for us both to feel comfortable.

DISSOLVE TO:

INT. PRESIDENTS ROOM - ST. BOTOLPH CLUB - BOSTON

SANDRA

I expect to have a long term, trusting relationship with all of my clients. I come to my office because I am passionate about helping women feel confident; I want to make sure women know what to do to take care of themselves financially. I put my clients' interests first and care about each of them. I find the most difficult things for many women to overcome are ...

SUPER - FADE IN THE WORDS: "INERTIA," "MAKE PERSONAL TIME," AND "EMBARRASSMENT" WHEN SPOKEN

SANDRA (CONT'D)

... inertia, making time for themselves, facing their concerns, or even embarrassment before they take the first step to meet. I love it when women tell me they feel so much better and in control of their financial lives after we get together. The women I see realize they need the assistance of a financial advisor. I spend time helping to educate my clients with a goal of increasing their financial confidence. I even ask questions on their behalf if I think it will help clarify their picture or add to their understanding. I find women can be the most motivated to speak with me when they have a life changing event like: a job switch, marital change, baby, or inheritance.

CUT TO:

INT. GREEN ATLANTIC ROOM - ST. BOTOLPH CLUB - CONTINUOUS

SANDRA

But really anytime is a great opportunity to re-examine your financial strategy or even create a plan. I welcome your contacting my Boston office and hope to hear from you.

Sandra smiles.

FADE TO:

INSERT - SANDRA GILPATRICK BUSINESS CARD IMAGE, END TITLES AND CONTACT INFO FOR SANDRA GILPATRICK, BRIEF CONTACT INFO FOR NICK IANDOLO, PRODUCER

FADE OUT.