Initial Contact Script

*This is the script you can use when reaching out to a Strategic Partner for the first time – one who currently works with one of your clients.*

Hello, is this [Strategic Partner Name]?

This is [Advisor First and Last Name]. You don't know me, but I am a Financial Advisor with [Firm] here in [City/Region], and it seems that we have a mutual client in [Mutual Client’s Name].

[Mutual Client] has said some good things about you, and that’s the reason I am reaching out to you today.

From time to time I am asked about referring the services of a [Lawyer/CPA/Insurance Advisor] such as yourself, and I don't know about you, but I am very careful about who I refer my top clients to.

I wonder if you would be open to meeting with me? The reason is that I would like to learn more about you, your practice, and what you do for your clients.

I’d prefer to meet at your office so I can understand more about the experience [Mutual Client’s Name] has shared with me.

My hope is that everything will be a good fit, and I might end up with someone to refer my top clients to when such a need arises.

Does that sound like something you would be interested in?

*If yes -* Great*. Set up the meeting day and time at their office.*

Just so you know who I am, I have an Introductory Kit that I send out when I meet with a prospective client for the first time. I'll send one of these out to you so you can learn a little bit about me and my practice, before we get together.

Thank you for your time today. I look forward to speaking with you.

*If no* – I understand and appreciate you taking the time to speak with me today. Have a great day.