Review Meeting Introduction Scripting

Look at the agenda for your meeting, and point to the item on the agenda when you begin speaking about the Introduction Process.

This scripting should take about 30-60 seconds.

* As a reminder, [Client] I’m going to take a minute now to go over our Introduction Process with you, in case you ever need it.
* As I’ve mentioned to you on prior occasions, it can be quite common that at some point you will encounter someone that has need of our services.  Someone you know may have uncertainties about the markets or their portfolios, perhaps they are going through a Critical Financial Event like we discussed, and there is uncertainty about that. Or, maybe they are dissatisfied with their advisor.
* If that situation does happen, if that person is important to you, then they are important to me.  I will always make the time to meet with them.
* Regarding how to handle it if you **do** encounter someone that might benefit from our services, really, the best thing to do is for **you**to give me a call, let me know about who the introduction is and their contact info., and of course to let them know I will reach out to them as soon as that is convenient, with their permission of course. And as you know, when I meet with someone for the 1st time, we have a process we take them through to determine whether it is a fit. Of course, we’ll get them out an Introductory Kit as well as a part of that process.
* There is no guarantee that this person will be a good FIT for me as a client, but that is irrelevant. I will meet anyone that is important to you, and if it turns out **not**to be a good FIT, I will do everything I can to point that person in a direction that **is** beneficial to them.
* Do you have any questions [CLIENT]?”