Initial Contact Script for Advisor

Step 2

*This script is used as the first point of contact when speaking with prospective new clients. The script is written to reflect the Advisor making an outbound call to a prospective client who has been referred by one of their best clients.*

* Hello, may I please speak with [Prospective Client's Name]? Thank you, [Prospective Client's Name]. This is [Advisor] calling from [Firm].
* The reason I’m calling is that [Name of Referrer] told me that you would be interested in finding out more about our services and how we may be able to help you (*make a direct connection to the client who referred them in regard to their relationship or common recreation/interest/association if appropriate – this will help create chemistry*).
* So, I just wanted to take a minute to share with you the process we follow when we meet with someone for the first time.
* The first step is for us to send you our Introduction Kit. It will provide you with important information about who we are and how you might benefit from what we do.
* The second step is for us to call you after you’ve received the Introduction Kit and had an opportunity to review it to book an introductory meeting.
* The first meeting is approximately 45 minutes long and is an opportunity for us to determine if there is a mutual FIT, which we believe is important. We will use that time to find out what is important to you, and of course, to let you know about who we are and our approach to Financial Planning.
* I want to emphasize that no decisions will be made at this first meeting. We believe the best decisions are made in an unhurried manner, so we feel it is very important for both of us to have a couple of days after this meeting to reflect on what we’ve heard and learned.
* On the follow up call, we will either mutually agree that there is a FIT and proceed to the next step, OR, one of us will determine that it isn’t a good fit and we’ll respectfully end the process at that time.
* Does that sound reasonable [Prospective Client Name]?
* Great - can I please have/confirm your mailing address so we can get this Introduction Kit out to you? As I mentioned, you can expect a call from [Assistant] after you receive the *Introduction Kit* to arrange a first meeting.
* Do you have any questions? Thank you for your time [Prospective Client]. I look forward to meeting you.