First Statement & Care Call

Step 17

*Target timeframe for delivery is when your new client is expected to receive their first set of statements.*

*This is a sample First Statement and Care Call Script for your new clients. Target is Week 4-6 of becoming a client. It’s recommended the Assistant makes this follow up call. Review and use Client Profile information on this call.*

* [Client] please?
* HI [Client], this is [Assistant] calling from [Advisor]'s office.
* I'm calling to confirm that you have received your first statement.
* I’d like to take a moment to review it with you if have 5 minutes right now.
  + *If* ***no****, rebook for a fixed time in the next 5 business days.*
* Our statements are laid out in the following manner…
  + *Describe the general layout.*
  + *Explain how accounts are grouped together for statement purposes.*
* Your statement also has the following features…
  + *Describe specific features.*
  + *Point out all useful information – including contact names, phone numbers and addresses.*
* You can expect to receive statements…
  + *Describe the frequency of which they can expect to receive their statements.*
* In addition to understanding the statements, I also wanted to make you aware of another service we offer…
  + *Showcase any other value-add services they can participate in, such as accounts online, etc.*
* Do you have any questions or concerns that I can help you with now?
* Thank you for your time today.
* If I can help you with any service issues or administrative help let me know.
* Good-bye and have a great day!