## **Client Transition Follow Up & Care Call**

Make the Follow Up & Care Call **one month** after the client has initiated the transfer, which means they will have received the following items ahead of it:

* Week 1 - Welcome Card
* Week 2- Welcome Letter & Introduction Kit
* Week 3 - Welcome Gift

It is recommended the **Assistant makes** this follow up call. Review and use Client Profile data on this call. Refer to the sample script, below:

[Client] please?

Hi [Client], this is [Assistant] calling from [Advisor’s] office.

I am calling to provide you with a quick update on your account transition process and answer any questions you might have. Do you have a few minutes?

At this time, [provide a full update on accounts opened and completed account transfers].

Also, do you prefer to receive your accounts as paper statements or online?

Great, let me explain how this will work for you going forward.

* *Outline the frequency of hardcopy statements and when to expect the first ones; or*
* *Outline the process for accessing the accounts online (set them up if required).*
* *For both scenarios, outline any key points about understanding the layout, format & content of the statements along with any features.*

Do you have any questions about this so far [Client]?

* *If yes, answer questions appropriately.*

Great. You can expect a call in the next couple of weeks from [Advisor] who will go over your current wealth and investment management plan in more detail.

It was great speaking with you - thank you for your time today. Good-bye and have a great day!