PFO Review Meeting Confirmation Call Script

*This is the confirmation call script for clients coming in for a Review Meeting.*

*It is recommended the Assistant makes this confirmation call.*

* [Client] please?
* This is [Assistant] calling from [Advisor's] office.
* I am calling to confirm your Review Meeting with [Advisor] at [time, on date].
* Please remember, [Advisor] will be reviewing and updating your Personal Financial Organizer.
* Therefore, it is important you bring your Personal Financial Organizer binder with you to this meeting.
* Do you have any other questions?
* We look forward to seeing you at [time], on [date].