PFO Review Meeting Scheduling Call Script

*This is the booking script for setting up Review Meetings with clients. It is recommended the Assistant make this call.*

*We recommend the Review Meeting is booked 2 weeks out from the date of this call.*

* [Client's Name] please?
* This is [Assistant] calling from [Advisor's] office.
* The reason I am calling is to arrange your [annual or semi-annual] Review Meeting with [Advisor].
* Are you available during the week of the [month and date]?

*This timeframe should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* Great [Client] – that day and time works for everyone.
* You can expect this meeting to be about one hour.
* Please remember, [Advisor] will be reviewing and updating your Personal Financial Organizer.
* Therefore, it is especially important you bring your Personal Financial Organizer binder with you to this Review Meeting – we will be providing you with some important updates.
* Before I go, do you have any other questions [Client]?
* Great - thank you for your time.
* We look forward to seeing you on [date and time].