## **Client Transition First Statement Call**

Make the First Statement Call about **4 to 6 weeks** 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
* Week 4 – Follow Up & Care Call

It is recommended the **Advisor makes** this follow up. It is best if the Assistant has booked this **phone call/virtual call** in advance so the client is available and expecting (to minimize communication tag). Review and use Client Profile data on this call. Refer to the sample script, below:

[Client] please?

Hi [Client], this is [Advisor] calling from [Name of Team/Firm] – it’s great to connect with you.

I am calling to go over a few important aspects of your recent transition process. Do you have a few minutes now?

* *If yes, proceed.*
* *If no, schedule a call back time.*

I’d like to review all aspects of your account recent account transitions, outline our next steps, and answer any questions you may have.

* *Go over all the accounts opened for them and their investment holdings in detail.*
* *Outline any recommendations for changes in their investments if required.*
* *Discuss any next steps related to your transition process or client servicing.*

Do you have questions about any of this or is there anything else I can help you with now?

Thank you for your time today – as always, it was great connecting with you.

If there is anything we can do, feel free to contact us anytime.

Good-bye and have a great day!