Follow Up & Care Call

*Target timeframe for delivery is* ***1 Month*** *after the Transition Meeting to build even more trust!*

*Refer to the sample script below. You can also leave a Voice Message based on this script.*

*This call is made by the New Advisor.*

* [Client] please?
* Hi [Client], this is [New Advisor] calling from [Firm]. Do you have a couple of minutes?
* I'm calling to follow up the meeting we had together last month.
* We covered a lot of things, and I am following up to make sure we are all on the same page – it is important to us that we are on top of what matters most to you and address any questions you may have.
  + *Be prepared to list off the specific items covered in the meeting if they ask you to remind them or go over them again.*
* Do you have any questions about any of these items or is there anything new we can help you with?
  + *If yes, answer their questions, discuss as appropriate and set another meeting if needed*
  + *If no, proceed with the script.*
* I really appreciate your time today [Client].
* Should anything else comes up or you have other questions, feel free to contact me any time – I’m happy to assist.
* Have a great day!