2nd Appointment Confirmation Call

Step 10

*This is the confirmation call script for new clients coming in for the 2nd Appointment.*

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

* [Client] please?
* This is [Assistant] calling from [Advisor's] office.
* I'm calling to confirm your appointment at [time, on date].
* We will be completing your *Personal Financial Profile* at this meeting.
* You will need to bring the documents with you that are listed on the checklist that came with the appointment confirmation letter.
* Did you receive the confirmation and checklist we mailed to you?
  + ***If yes:***

Great, do you have any questions about the list?

Have you had trouble getting all the documents together?

*If yes, offer to reschedule the appointment if the client requires more time.*

* + ***If no:***

[Client], these documents are required for you and [Advisor] to have thorough discussion about your current situation – which is very important.

To give you time to gather the material, let’s go ahead and reschedule this appointment for you.

*Confirm address, resend checklist, and reschedule appointment for later date, saying:*

* Terrific - we look forward to seeing you at [time] on [date].