1st Appt. Rebranding Confirmation Call

Step 5

*This is the confirmation call script for existing clients coming in for the 1st 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].
* As part of this process, you will need to bring the documents listed on the checklist that came in the earlier letter.
* Did you get the 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 rescheduling appointment if the client requires more time.)

* + *If no:*

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

"[Client], the documents are crucial for this particular appointment, so in order to give you time to gather the material we will need to reschedule the appointment.”

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