1st Appt. Rebranding Pre-Booking

Step 1

*This is the script Advisors should use with their existing clients who will be going through the rebranding process. It’s best to make the pre-booking call when the client is the next one to go through the rebranding process and is an excellent way to set the stage for the 1st Appointment Booking call made by the Assistant.*

* [Client's Name] please? Hello, this is [Advisor] calling.
* The reason I am calling is to let you know [Assistant] will be calling you shortly to arrange an appointment with me.
* At this appointment, I am going to discuss a few important things with you.
* First, I’m going to discuss with you some recent enhancements made to our wealth management process. These updates stem from experiences we’ve had with our best clients over the years – coupled with the fact we are always striving to do better for you.
* We continue to be focused on helping you simplify, organize and coordinate all aspects of your wealth management and this will be a key part of our meeting.
* We’re excited about this and I am confident the result of this initiative will give you greater peace of mind as it relates to your overall financial situation.
* Secondly, when we meet, I’m going to carefully update all your financial goals and objectives. This means reviewing the goals and objectives that we are aware of, as well as discussing any new goals you may have.
* Third, I am going to completely update your financial situation to ensure all the information I have for you is current and up to date.
* Any questions so far?
* One more thing. We’ve recently developed an Introduction Kit that describes our practice. This is something we send out when we’re introduced to a prospective client so they can get a better understanding of who we are and what we do, even before they come in and meet us. We’re going to send one out to you too as well because I think it’s important that you’re aware of it.
* We expect this appointment will take about one hour of your time. Before I go, do you have any questions [Client]?
* Great - thank you for your time and you can expect to hear from [Assistant] tomorrow to go ahead a book a time and place for this appointment.
* Have a great day.