3rd Appointment Confirmation Call

Step 12

*This is the confirmation call script for new clients coming in for the 3rd 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].
* At this appointment, [Advisor] will be presenting you with your *Personal Financial Organizer* so that you canbegin implementation of the strategies to help you meet your financial goals and objectives.
* It is important to bring your (*identify any documents that you require to begin implementation – identification, void check, etc*.) to this appointment.
* These items will be required to get things underway for you.
* Do you have any questions?
  + *If yes* – answer questions and then proceed.
* Great - we look forward to seeing you at time, on date.