The FIT Call Script

Step 8

*This is the sample script for Advisors conducting the Is there a Fit Call with a prospective client.*

*It is important the Advisor discloses their decision first on this call.*

* [Prospective Client] please?
* Thank you, [Prospective Client]. This is [Advisor] calling from [Company].
* First, let me say how much I enjoyed meeting you the other day.
* As I mentioned at the end of our meeting, I am calling today to discuss if there is a ‘FIT.’

**IF YOUR DECISION IS YES:**

* + I have carefully considered our meeting and discussed it with my staff.
  + Our decision is that we have the capacity to serve your situation nicely, and I am confident that we will work very well together.
  + What is your feeling on the matter?

**If their decision is YES**

* + - Great!
    - To get the financial planning process started, we need to schedule our next meeting to complete your personal financial profile.
* Is it convenient for you to meet the week of [2 weeks from date of call]?
* We have availability at (give one time).
  + - Great. We will send you a checklist that details the documents you need to bring to this next meeting.
    - If you have not received this within a week, be sure to call [Assistant].
    - Looking forward to seeing you then.

**If their decision is NO**

* Well [Prospective Client], I totally respect your decision.
* I just want to say that it was a delight to meet you and I enjoyed our meeting.
* You know where I stand. Should you ever wish to have a look at this again, please call our office and we can revisit the process at that time.

**If their decision is “Have Not Made Up My Mind/Interview other Advisors”**

* Completely understand, my process for FIT is an interview as well.
* I just want to say that it was a delight to meet you and I enjoyed our meeting.
* You know where I stand. Should you wish to have a look at this again, please call our office and we can revisit the process at that time.

**IF YOUR DECISON IS NO:**

* + I have carefully considered our meeting and for your situation, I don’t think that I am the best Financial Advisor for you.
  + GIVE 1 or 2 good reasons. NO MORE, NO LESS.

I*f you know of another Advisor in the office, you think they may want to meet with:*

* “My belief is that you would still benefit from the financial planning process, and to that end, I recommend that you meet with [Alternative Advisor]. Given your circumstances, and his/her approach, I think there is a good possibility of a FIT there.”
* I certainly enjoyed meeting you and I wish you all the best in the future.