1st Appointment Confirmation Call

Step 6

*This script is used to confirm the 1st Appointment with a prospective client.*

*This call should be made two days prior to the scheduled 1st Appointment.*

*It is recommended the Assistant makes this call.*

* [Prospective Client] please?

* Thank you, [Prospective Client], this is [Assistant] calling from [Advisor]'s office.
* I'm calling to confirm your appointment with us at [time], on [date].
* Great.
* Was the map we provided you clear?

*Answer any questions they may have about how to get there.*

* Do you have any questions about where to park?

*Answer any questions they may have about where to park.*

* Ok then - we look forward to meeting you soon.
* Have a nice day [Prospective Client].