

SAMPLE SCRIPT: Request a client meeting or client review

Dear [Client Name],

Communication is a critical component of our partnership. In fact, it's one of the best ways to ensure that you're best positioned to meet your goals.

I'm writing to confirm our quarterly review session on Thursday at 10:00 a.m. To help us have a productive session, I would like you to spend some time thinking about something before we meet.

Specifically, what are your **three** primary concerns with the money you have in cash?

I would encourage you to discuss it with [Spouse/Partner Name] and to compare how each of you answers that question. Do you share the same concerns?

I'm looking forward to discussing your answers when we meet. In the meantime, please reach out with any questions or concerns.

Thanks,

[Advisor Signature]

SAMPLE SCRIPT OR EMAIL: Ask clients to review your performance

Dear [Client Name],

You're one of my most loyal clients and it's important to me that we continue to have an open and honest relationship.

In fact, I'd be very interested in hearing your opinions on the service and experience we're providing to you.

Do you have time to meet in person next week to give me a performance review? We can meet over breakfast or lunch (on me, of course) to discuss this in more detail.

Let me know what dates work for you.

Sincerely,

[Advisor Signature]

SAMPLE SCRIPT: Email to prospect summarizing first meeting and next steps

Dear [Prospect Name],

Thank you for taking the time to meet with me this afternoon. The information you shared is crucial to helping us evaluate how we can help you meet your goals, retain your employees, and provide for your loved ones.

Based on our conversation, my team is committed to providing the following items in the next three days:

- > A comprehensive estate planning review
- > A scheduled follow-up appointment to review how you can upgrade your retirement plan for your employees
- > Details on our upcoming client seminar, which focuses on tax efficiency during retirement

I'm looking forward to our next conversation. In the meantime, please contact me with any questions.

Sincerely,

[Relationship Manager or Advisor Signature]