PHONE SCRIPT

Pre-Qualification

Hi my name is ____________________ with Retirement Account Advisors.

I'm the Advisor that was assigned to your case after you filled out the form on social media to find out more about the Retirement Protection Plan. That was where you put your favorite vegetable is ____________________ and that you're planning to retire in ____________________.

Before we get started, I need to send you over my virtual business card so you can see who I am. It also has my National Producer Number, which is like my social security number. I can send it via text or would you prefer email since we're on the phone?

So when you saw the ad on social media, what prompted you to respond to it?

Prompt with … was it inflation, taxes, market losses, retirement income?

Tell me more…What has you concerned?

(Continue conversation about concerns)

Anything else?

On a scale of 1-5, how concerned are you about running out of money during your retirement?

Explain the Qualification Portion

Got it. So based on our brief conversation, I'd like to have a Discovery Call with you to continue talking about our Retirement Protection Plans.

The Discovery Calls take about 10-15 minutes to review your current situation and see if you would qualify for any of our secure retirement plans that would help you.

To do that, I'll be asking some questions about your current plans for retirement and what you're hoping to achieve during your retirement.

Does that make sense?

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Based on your answers, if I think you would be a good candidate for our Guaranteed Retirement Program, I'll let you know and we can schedule a follow up on Zoom with you and your spouse. I'll share my screen with you so you can see the numbers and ask questions, etc.

And if I realize this is not going to be a good fit for your situation, I promise to let you know that as well, so I can be respectful of your time.

Fair enough?

Do you have about 10 minutes right now for a Discovery Call?

(If yes, go into questions then book follow up zoom meeting within 24-48 hours)

(If no, book a Discovery Call within 24 hours)

Discovery Call

For the Discovery Call, let's begin with general information questions to get started. *(Complete the Client Intake Form then schedule a follow up if they are a candidate for a Retirement Plan)*

What I'd like to do next is create a personalized Retirement Protection Plan for you and meet over zoom to review it together. You can see if it makes sense for your situation and I can answer any questions you might have.

I'm available ____________________ . When is a good time for us to schedule that follow up?

Great! I'll see you then!