

Client Review Scripts and Email Templates

Appointment Setting Call Script

Hello, may I speak to [Client's First Name(s)]? This is [Your Full Name] calling from [Firm Name]. I am calling to schedule your next review meeting with [Advisor Name].

We're currently setting appointments during the week of [Month and Date]. Is there a time of day or day of the week that works best for you? (Work with the client to find a suitable time that fits within the advisor's preferred schedule. Give client a specific date and time as a suggestion.) Does Monday, the 13th, at 11:00 work for you?

I will send you an email confirming the appointment. It will include an agenda and a quick update form for you to complete and send back so we can make sure your financial plan is updated before the meeting. Is [Email Address] the best email to use for you?

Great. We'll see you Monday, the 13th, at 11:00. We look forward to the meeting. If you have any questions beforehand or need to reschedule, please call me at [Your Direct Line] or [Your toll-free direct line].

Appointment Setting Email Template

Hi [Client's First Name(s)],

It's time for your next review meeting with [Advisor Name]! We look forward to catching up with you and making sure you're still on track to meet all of your goals.

We're currently scheduling appointments for [Month and Date]. To view [Advisor Name's] calendar and schedule a meeting at your convenience, use this link: [Insert scheduling link].

If you have any questions at all or would prefer to schedule by phone, please don't hesitate to call me at [Your Direct Line].

Thank you in advance!

[Your Name]

Appointment Confirmation Email – In-Person

Subject: Appointment Confirmation

Text Body:

Dear [Client Name(s)],

This is confirmation that you have an appointment with [Advisor's Name] on [Date and Time]. Our office is located at [Office Address]. I've attached a meeting agenda for your review.

As you know, your wealth plan is an ever-changing road map, and must be continuously monitored to ensure the highest possibility of attaining your goals. As your life changes, so do your goals and the plan it takes to reach them. With this in mind, we would like to review your goals, the progress of your wealth plan, and your financial situation. The attached Wealth Plan Update Questionnaire is the tool we use to begin the process.

Prior to your appointment, please:

- » Let us know if there is a specific topic you would like to discuss by responding to this email or calling [Team Member's Name and Phone Number].
- » Complete and return the Wealth Plan Update Questionnaire.
- » Upload the latest statements for any outside accounts like 401(k)s to your client portal.

Please don't hesitate to let us know if you have any questions.

We look forward to your appointment.

Sincerely,

[Name]

Appointment Confirmation Email – Virtual

Subject: Appointment Confirmation

Text Body:

Dear [Client Name(s)],

This is confirmation that you have an appointment with [Advisor's Name] on [Date and Time]. I've attached a meeting agenda for your review.

At the time of your appointment, please use this link to join the meeting from your computer or mobile device: [Insert link]

As you know, your wealth plan is an ever-changing road map, and must be continuously monitored to ensure the

highest possibility of attaining your goals. As your life changes, so do your goals and the plan it takes to reach them. With this in mind, we would like to review your goals, the progress of your wealth plan, and your financial situation. The attached Wealth Plan Update Questionnaire is the tool we use to begin the process.

Prior to your appointment, please:

- » Let us know if there is a specific topic you would like to discuss by responding to this email or calling [Team Member's Name and Phone Number].
- » Complete and return the Wealth Plan Update Questionnaire.
- » Upload the latest statements for any outside accounts like 401(k)s to your client portal.

Please don't hesitate to let us know if you have any questions.

We look forward to your appointment.

Sincerely,

[Name]

Appointment Reminder Call Script

Hello, may I speak to [Client's First Name(s)]? This is [Your Full Name] calling from [Firm Name]. I am calling to remind you of your meeting with [Advisor's Name] on [Date and Time].

[If live answer- wait for client to confirm; if they need to reschedule, do so on the phone.]

[If voicemail – If you have any questions or need to reschedule, please call us at [Phone Number]].

Thank you!

Appointment Reminder Email

Subject: Appointment Reminder

Text Body:

This is a reminder that you have an appointment with [Advisor's Name] on [Date and Time].

If you need to reschedule or have a specific topic you would like to discuss during your appointment, please notify us as soon as possible by emailing or calling [Team Member's Name, email and Phone Number].

We look forward to your appointment.

Sincerely,

[Firm Name]

Appointment Follow-Up Email

Subject: Appointment Follow-Up

Text Body:

Dear [Insert Client's Name],

It was great catching up with you during our recent meeting on [Insert Date of Appointment]. Here's a brief summary of our discussion:

Points of Discussion:

» [Insert summary of review meeting]

Please let me know if I missed any items or any of these discussion points are incorrect.

Action Plan:

» [Insert action items coming out of review meeting]

Thank you so much for your continued confidence; we love working with you and your family. If you know of someone who would benefit from our guidance, please don't hesitate to make an introduction. We would appreciate the opportunity to further fulfill our mission and will treat them like friends.

If you have any questions, please contact me by email at [Insert Email Address] or by phone at [Insert Phone Number].

Sincerely,

[Insert Advisor's Name]



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