

## Referral Script

Hi may I speak to \_\_\_\_\_. My name is \_\_\_\_\_ I'm a financial coach. \_\_\_\_\_ asked me to give you a call. Did he/she mention me at all?

### If they say, YES.....

If your busy, I can be really brief is that ok?

### If they say, No.....

I'm so sorry I'm catching you off guard. \_\_\_\_\_ said he/she would call or text you. If your busy, I can be really brief is that ok?

I'm a financial coach and I recently met with \_\_\_\_\_ and \_\_\_\_\_. I was able to help them in a financial nature.

They were most impacted by the financial education, concepts and strategies that they learned.

I asked them who they knew that was hard working and responsible, that they cared about and have a lot of credibility with, that would benefit, and your name popped up.

\_\_\_\_\_ said that you were the type of person that if there were information about getting ahead financially or enhancing what you're currently doing that you would definitely be open to taking advantage that. Is that true?

Great! Well, I'd like to put your mind at ease. I don't charge a fee to meet with me so there is no consultation fee's because I get paid by the companies that I represent. However if you see the same value as \_\_\_\_\_ I may ask you to refer me to some of your friends and family, as long as you felt really comfortable. Is that fair?

Close.....

Therefore, would you be open to an exploratory appointment at no cost or obligation?

Optional

*Ok great before we attempt to schedule a time to meet I just need to ask you a few brief questions just to insure I can bring you some value because I wouldn't want to do anything to waist your time! Is that ok?*

*Are you married or do you live together with a significant other?*

*What are your occupations?*

*Do you have an active retirement plan with your current employer?*

*What about with an old employer?*

*Do you have children? How old is your youngest child?*

*Do you have life insurance outside of your job? What's the companies name?*

*Do you have \$10,000 or more in credit card debt?*

*Do you owe the IRS any back taxes?*

**(Close for appointment)**

**Are you and your wife generally together daytime, evenings, or weekends?**

**I have Monday open or is Wednesday best? Is 6pm good or is 8:30pm better?**

**What part of the area do you live?**

**What is your address?**

**(Confirm address and time.)**

**I just need you to do me a few favors, then we'll be done.**

- 1. Did my name pop up on your caller ID?  
Please lock my name and number in so that if you have to reschedule you can reach me.**
- 2. If you could let your spouse know as well so they don't schedule anything else around that time.**
- 3. Last.. 50% of my appointments tend to reschedule do to family ....  
Work life! People naturally forget.... So could you put that in your schedule? That would be a big help to me.**

**Thank you for your time. I look forward to meeting you and \_\_\_\_\_. Have a good evening.**