**Review Meeting Booking Script**

*This is the booking script for setting up Review Meetings with clients.*

*We recommend the Review Meeting is booked 2 weeks out from the date of this call.*

*As always, personalize calls based on FORM information you have.*

If Financial Planner is making the call:

* May I speak with [Client's Name] please?
* This is [Financial Planner] calling from [Organization].
* The reason I am calling is to arrange your [annual or semi-annual] Review Meeting.
* Are you available during the week of the [month and date]?

*This time-frame should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* Great [Client] – that day and time works for me too.

*For your “A” Clients Only:*

* Please remember, we will be reviewing and updating your Personal Financial Organizer. Therefore, it is very important you bring your Personal Financial Organizer binder with you to this Review Meeting.
* You can expect this meeting to be about one hour.
* Before I go, do you have any other questions [Client]?
* Great - thank you for your time.
* I look forward to seeing you on [date and time].

If Assistant is making the call:

* May I speak with [Client's Name] please?
* This is [Assistant] calling from [Financial Planner’s] office.
* The reason I am calling is to arrange your [annual or semi-annual] Review Meeting with [Financial Planner].
* Are you available during the week of the [month and date]?

*This time-frame should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* Great [Client] – that day and time works for everyone.

*For your “A” Clients Only:*

* Please remember, [Financial Planner] will be reviewing and updating your Personal Financial Organizer. Therefore, it is very important you bring your Personal Financial Organizer binder with you to this Review Meeting.
* You can expect this meeting to be about one hour.
* Before I go, do you have any other questions [Client]?
* Great - thank you for your time.
* We look forward to seeing you on [date and time].