Initial Contact Script for Advisor

**Client Onboarding STEP 2**

Use the following telephone script as a guide to assist you with making initial contact.

* May I speak with [Potential New Client] please?
* Thank you, [Potential New Client]. This is [your name] calling from [Credit Union/Organization].
* The reason I am calling is that [Referrer Name] told us that you would be interested in learning more about how our services could help you.
* At [Credit Union/Organization] we have a process we follow when bringing on new clients to ensure everyone is on the same page with respect to what you need and what we can provide.
* The first thing is for us to set up an introductory meeting where we both meet and learn more about each other. This first appointment is about 45 minutes long and provides an excellent opportunity for each of us to determine FIT.
* I want to stress that no decisions need to be made at this first meeting. Our philosophy is that the best decisions are made in a thoughtful, unrushed manner, so we feel it is important for both of us to have a couple of days to reflect on what was discussed at the meeting. During that time:
  + You can determine if I can meet your needs and expectations, and
  + I will determine if your needs are well suited to our services and approach.
  + If I determine that you would be better served by one of our other specialists, I will introduce you to the [Credit Union/Organization] specialist who can provide solutions to meet your individual goals and objectives.
  + Regardless, I will make sure you are well taken care of.
* Prior to our first meeting, we are going to send you our Introduction Kit which will provide you some initial background on who we are, what we do and how we can help you. Can I please have (or confirm) your mailing address so we make sure that arrives in good order?
* Thank you for your time today [Potential New Client].
* I look forward to meeting you.