# Review Meeting Confirmation Call Script

*Use the following telephone script as a guide to assist you with confirming a Review Meeting with your clients.*

If Financial Planner is making the call:

* May I speak with [Client Name] please?
* This is [Financial Planner] calling from [Organization].
* I'm calling to confirm our appointment at [time, on date].
* Please remember, will be reviewing and updating your Personal Financial Organizer.
* *For “A Clients” only:* Therefore, it is very important you bring your Personal Financial Organizer (the binder) with you to this review meeting.
* Do you have any other questions?
* I look forward to seeing you at [time], on [date].

**If your Assistant is making the call:**

* May I speak with [Client Name] please?
* This is [Your Name] calling from [Organization].
* I'm calling to confirm your appointment with [Financial Planner] at [time, on date].
* Please remember, [Financial Planner] will be reviewing and updating your Personal Financial Organizer.
* *For “A Clients” only:* Therefore, it is very important you bring your Personal Financial Organizer (the binder) with you to this review meeting.
* Do you have any other questions?
* We look forward to seeing you at [time], on [date].