# Email #1 Script – Warm Touch to Set Up Call

**Client Onboarding STEP 2**

Use the following email script as a guide to assist you with setting up a preliminary conversation with the prospective new member.

Copy and paste this script, modify it as appropriate and save it as an Outlook Template.

We recommend you had a PDF which contains your Insurance Advisor Biography.

Hi [Prospective Insurance Client],

My name is [Insurance Advisor] and I have the distinct pleasure of assisting our [Name of Credit Union] members with their specific insurance needs.  [Name of person who made the referral] asked me to reach out to you to review your insurance needs and discuss your options.

I understand you are in the process of [purchasing a home/insert life event here]; it is important to explore your protection options at this time.  As a qualified and experienced Insurance Advisor, I work with numerous insurance companies. This allows me to carefully review the various insurance solutions and options available to you, to ensure we find the best coverage for the best price.

I will call you [Day of Week] at [time] to get an overview of your specific needs and discuss your potential concerns.  If there is a better time for me to call please let me know and I will try to accommodate.

My goal is to simplify your life by:

* Organizing your insurance policies
* Explaining them to you clearly, and
* Quantifying how much is enough, so your earthly family will be taken care of

I look forward to getting to know you and assisting you with your insurance needs.

Your Standard Email Signature.