

INTRODUCTION PROCESS SCRIPTING FOR TURBULENT TIMES

This introduction script can be used when you are making active outbound phone calls to your best clients during turbulent market times. In order for the scripting to be effective, the Advisor first has to have sufficiently addressed any issues or anxieties with their client. This may involve one or more of the following depending on the client and the situation:

- Reinforce your client's long-term goals and objectives;
- Re-emphasize how a well-diversified portfolio `protects` during times like these;
- Realize the peril of getting faked-out and veering from the plan during corrections like these;
- Understand the role of the media and its ability to generate panic to ensure viewership and ratings; and
- Ultimately, being the voice of reason (and saving them from making bad decisions while in an emotionally charged state).

In addition, Warren Buffet and Peter Lynch are great at any time, but especially for their quotes in times like these which zero in on what is really important. If you don't already have a favorite, you might want to find one.

THE INTRODUCTION SCRIPT FOR TURBULENT TIMES

Master the nuances of this script so that you can deliver with conviction and passion. Then say it during every phone conversation and face-to-face meeting with your best clients - after your reaffirmations that the world is not ending.

You know, John, these are exceptional and unusual times right now. And, it's important for me to remind you that I'm here for you as a resource to help you and those you care about.

Understandably, there are many people right now who are stressed out and may have a great deal of anxiety about their investments, the market and their financial future. Some may even be experiencing significant life events right now and require professional guidance and advice on what to do in the midst of all of this. And still others may mention to you that they really aren't happy with their current advisors. Regardless, we are talking about people's life savings here – so it isn't something to be taken lightly. Not now, and not ever.

So, if you have a friend or family member who you think needs some assistance, I would be happy to meet with them to try and help them out. I can't promise you that they will become a client, because I'm not all things to all people. But, regardless of the outcome, I will do my best to point them in the right direction so they will be better off.

So, if you should run into someone that needs help or guidance, give me a call and let me know. I will make the time to reach out to them because if they are important to you, they are important to me.

Do you have any questions?

DON'T MISS THE HUGE OPPORTUNITY

With the level of current and future expected market volatility, if you aren't conveying this to your best clients, you are missing a huge opportunity. It is during times like this that clients are frustrated, looking for guidance and ready for a change, and some of these potential clients are friends and family of your best clients.

Seize volatility for the opportunity it is.