

# The Introduction Process

## Scripting

*Look at the agenda for your meeting, and point to the item on the agenda when you begin speaking about the "Introduction Process" or "Value-Added Services".*

*This scripting should take about 30-60 seconds.*

[NEW CLIENT], now that we will be working together, I am going to briefly explain what my Introduction Process is.

[EXISTING CLIENT], from time to time, I am asked by a good client if I will help someone that is important to them. Of course, the answer is 'yes,' so I've written up a process to show the best way to handle that if you ever personally run into that situation. I'm going to share that process with you now, and I'll remind you about it from time to time.

- Over the course of our relationship, it is very likely at some point that you will encounter someone that has need of our services. Someone you know may have uncertainties about the markets or their portfolios, perhaps they are going through a Critical Financial Event like we discussed, and there is uncertainty about that. Or, maybe they are dissatisfied with their advisor.
- If that situation happens, and historically speaking, my experience tells me it will, you should know that if that person is important to you, then they are important to me. I will always make the time to meet with them.
- There is no guarantee that this person will be a good FIT for me as a client, but that is irrelevant. I will meet anyone that is important to you, and if it turns out not to be a good FIT, I will do everything I can to point that person in a direction that is beneficial to them.
- Regarding how to handle it if you do encounter someone that might benefit from our services, really, the best thing to do is for you to give me a call, let me know about who the introduction is and their contact info., and of course to let them know I will reach out to them as soon as that is convenient. I will also send them out an Introductory Kit as I did for you.
- (If you do not have an Introductory Kit then eliminate that last bit from the script. You will be creating an Introduction Kit in this program.)
- Do you have any questions [CLIENT]?"

