



GLOBAL AMERICA FINANCIAL

CALL COACHING & SCRIPTS



New Agent Practice/Training

- “The reason I am calling you today is because I have recently started doing some work in financial services. I need a favor from you. I need for you and your spouse to sit with me and my trainer for about 30 minutes. I want to show you what I am doing and to see if there is any way I can help you and your family. (If there is push back, use their HOT BUTTON and complement them) I would love for you to become my client but that is not the ultimate goal. The ultimate goal is to show you what I am doing so that you can refer your friends and family to me.”

Experienced Agent Practice/Training

- “The reason I am calling you today is because I have expanded my business to include financial services. I need a favor from you. I need for you and your spouse to sit with me and my trainer for about 30 minutes. I want to show you what I am doing and to see if there is any way I can help you and your family. (If there is push back, use their HOT BUTTON and compliment them) I would love for you to become my client but that is not the ultimate goal. The ultimate goal is to show you what I am doing so that you can refer your friends and family to me.”

Experienced Agent w/ Existing Clients

- “The reason I am calling you today is because I have expanded my business to include financial services. I want to schedule a complimentary analysis to make sure you are on track to meet your financial goals. I need for you and your spouse to sit with me for about 30 minutes. (If there is push back, use their HOT BUTTON and compliment them) I would love to help you achieve your financial goals.”

Holiday/Social Events

- **Agent:** What do you do for a living?
- **Prospect:** I am a _____. (99% of the people will then ask) What do you do for a Living?
- **Agent:** Long story short, I assume you have some sort of a 401k* (Product based upon occupation. Ex: Teacher-403B, Self Employed-SEP IRA)
- **Prospect:** Yes.
- **Agent:** Have you ever lost money in that account?
- **Prospect:** Of course.
- **Agent:** I educate people on how they never have to lose money when the market drops, guaranteed and backed by A-Rated companies that have been around for 150-300 years.
- **Prospect:** How do you do that?
- **Agent:** (laugh) I told you it was a long story short. We are supposed to be having fun. Let's exchange numbers and we can discuss more about it in a few days.

Are you a good Saver?

- **Agent:** Can I borrow you for just a few seconds?
- **Prospect:** Yes.
- **Agent:** Are you good or bad at saving money or putting it away for the future?
- **Prospect:** *Their answer doesn't matter.*
- **Agent:** I just want to show you what I am doing with my money and how it is growing, like on steroids. It won't cost you a penny. Is tomorrow at _____ a good time or will _____ be better?