

## Field Trainer Setting Appt w/ New Rep on Phone

**New Rep:** Hello \_\_\_\_\_. This is \_\_\_\_\_, I've got a friend on the phone I want you to meet. His name is \_\_\_\_\_.

Hey (Prospect) how are you? **New Rep** has entered our training program to become a financial representative and they have to get licensed through the state. Now in order for them to get their license, they must complete 12 hours of field training and they said that you and Spouse Name would be willing to help them with that....

Was he correct in saying that?

WFA...

All you have to do is listen to a short presentation and fill out a short survey. Fair enough?

Now Im scheduled to work with **New Rep** today and tomorrow at 12pm, 6, & 8pm est, which one of those times work best for you?

Great I am going to email you the ZOOM meeting link, what is your email?

## **New Rep Setting Appointment while Field training Listens**

**New Rep: Hello \_\_\_\_\_. This is \_\_\_\_\_,**

**Im in a program to become a financial rep, I need 20 hours of field training. Will you help me?**

**All you have to do is listen to a short video conference and fill out a short survey. Fair enough?**

**What works best for you and [spouse name], weekdays or weekends? Wednesday or Thursday/ Saturday or Sunday, Afternoons or evenings? 1:00pm or 3:00pm/ 6:00pm or 8:00pm?**

**Great I am going to email you the ZOOM meeting link, what is your email?**

**Please do me a favor and write our appointment down in your calendar, it is really, really important for my training.  
Awesome, Ill be on your screen at (Date and Time)**

