

RVPs JULIA & TERRELL TATE CLIENT REFERRAL SCRIPTS

CLIENT REFERRAL

Hi, _____ (FB Prospect). My name is _____ (*you, the Agent*). I was referred to you by _____ (referring prospect/your direct recruit, familiar with FB Prospect). Did he/she tell you I would be calling? Great! I had an opportunity to sit down with (*referring prospect, familiar with FB Prospect*) last week and shared some money concepts with her (*or other specific product shared with referring prospect/your direct recruit, familiar with FB Prospect*).

He/She was really pleased with my information and became part of our program. She asked me to give you a call because she believes you will also be blessed by the information.

I'm calling you to set up a time to talk with you on a Zoom video conference and share the same info I shared with (*referring prospect/your direct recruit, familiar with FB Prospect*).

What day and time works for you Wednesday or Thursday? 6:30 or 7:30?