



## LET'S TALK

### WARM MARKET:

#### HELP ME SCRIPT

Hi \_\_\_\_\_ this is \_\_\_\_\_ (Small talk/ warm up)

I don't know if you've heard I recently took a position with a financial services firm called LimitReal.LLC and I need your help. (Pause, they will usually ask how I can help).

Well I am in their training program, and that includes classroom training, getting my licenses, and 5 on-the-job training appointments. My goal is to get my 5 training appointments done in the week and I value your opinion and was hoping you (and \_\_\_\_\_ ) would help me out by being one of my training appointments. You'll help me out, won't you? (Wait for answer).

Great, thanks! What is better for you Wednesday or Friday at 7pm?

### WHAT IS IT?

It's about 45 minutes and it's online through Zoom and we'll show you all the stuff we do. Then in the future you can give me referrals. If nothing else, I get my training out of the way. You will help me, won't you? Great, I'll register you for the presentation so you can get an email confirmation. All I expect is your feedback. I really appreciate your help.

**OBJECTION: "Can you just send me information on email?" For my training, I need 5 people to observe and get feedback. Don't worry, it's not a sales presentation.**

*\*Registration for Financial Opportunity Presentation: Go to*

### Lukewarm market

Hi, \_\_\_\_\_, I am \_\_\_\_\_, do you still remember me? We met in...[use FORM] Are you still living in \_\_\_\_\_?

How about your job? Do you still work in \_\_\_\_\_? Any plan in future?

The reason I am calling is that I recently took a position with a financial service company called LimitReal.LLC. They are based in Dallas TX but are expanding to all 49 States. Our company is opening new offices in this area. We are looking for quality people, to train them and work with them on a full time or part time basis. I was wondering if you are open to new opportunities.

If "YES",

We have Financial Presentation Online on Wednesday or Friday evening at 7pm. Which day is better for you? (Wait For Answer). Ok, I'm going to text you the registration because it's going to be an online presentation for 45minutes. Don't worry, this is not sales presentation. By the way, please be in a quiet

room so you can be able focus on the information during the presentation. Although you can do it on your Smartphone, I prefer that you're on your desktop or laptop computer. See you then.

If "NO",

That is fine. I am very excited about what we do for the people. Traditional financial services focus on rich people. We are different. We are dedicated to help people, especially the middle-income families understand how money works, how to save tax, save money, plan for buying a house, kid's education, retirement, and so on. We have an online presentation on personal finance on Thursday 7:30pm or could do a one on one? Which one do you think will work better for you? **(If no, that is FINE, if you change your mind later, give me a call and please keep me in mind if you know people who need an opportunity or start giving their financial house in order but don't have anyone to help them.**  
If yes, which day is better for you?)

Business Card / Cold Market Script

**STAND UP! TALK LOUD! USE PHYSIOLOGY! BE CONFIDENT!**

Remember, YOU know the script. They don't. They won't know if you mess up!

Hello,

\_\_\_\_\_ (their name), my name is \_\_\_\_\_ ( your name).

I am an associate for a company called LimitReal.LLC..... have I caught you at a bad time?

\_\_\_\_\_ ( their name), my firm has recently opened up a new office in the area and we have a very aggressive recruitment campaign (currently) going on. I have had your business card here for some time and I apologize that this is the first time I've had to give you a call. The reason why I am calling You is because our firm flat out has had a lot of success working with people with your background. Let me ask you a question, are you still working in \_\_\_\_\_ (management, sales, finance, etc) there are \_\_\_\_\_? ( Their company's name) \_\_\_\_\_ (their name), I have no idea whether you'd be interested in working with our firm or even if you would be a fit for us, but because our firm is expanding right now and given the fact that we have had a lot of success with people of your background, I think it makes sense that we get together and meet. Okay?

This will be 45 minute online presentation. This may or may not be for you but this will just give us a chance to get to know if this might give value to your business. After that you can just give me your feedback.

If it seems like there's some interest, we can pursue more of a formal interview down the road. Does that sound good to you? I have times available tonight at 7pm or Friday at 7pm. Which day is best for you?  
Great, I'll see you on \_\_\_\_\_ at \_\_\_\_\_? I'll see you then!