## New Associate Scripts (Unlicensed)

### Favor Appointment Setting Script

***Keywords: Favor → Financial Licenses → Training → Help***

Hey [Name], how are you? MAKE SMALL TALK

Awesome. By the way, I need a **favor**. I'm working on getting some **financial licenses**, and I'm going through a **training** program. I have to learn how to give a presentation. So I wanted to see if you could **help** me out with that? *WFA*

Great! All I need is 30 minutes. And just so you know, it's just going to be financial education, so the more questions you ask, the better for me. Okay?

So as far as getting together, I'll be with my trainer on [Day] or [Day] — which one works better for you and [Spouse's Name]? *WFA*

Got it. Would [Time] or [Time] be better? And both of you will be on, right? *WFA*

I just need your email so I can send over the Zoom link and confirmation. By the way, my trainer will be joining us. Can you go ahead and add it to your calendar so we can lock in the time? *WFA*

Thanks so much for helping me out! I'll see you [Day] at [Time].

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### Reference Text Appointment Script

Hey! I need a **favor** from you. I put you down as a reference. I'm getting some **financial licenses**. The person training me asked if I knew anyone that could say some good things about me as well as someone that could potentially **help** with my **training**. I gave them your number.

[TRAINER NAME] will call you either today or tomorrow from [PHONE NUMBER]. Please take the call. Thank you. I appreciate your help!


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## Licensed Agent Scripts

### Favor Appointment Setting Script

Hey [Name], how are you? How's the family doing? *WFA*

So the reason I'm calling is, I don't know if you already know this or not, but I'm licensed in the financial industry and I wanted to find a time to get together so you and [Spouse's Name] can see what I do. I'm sure you're probably all set, but I'd still love to meet so if someone you know ever needs what I do, you'll feel comfortable introducing me. Would that be okay? WFA

Great! — it's just a short 30-minute Zoom call. So what day works better for you and [Spouse's Name] — [Day] or [Day]? *WFA*

Got it. Would [Time] or [Time] be better? *WFA*

And both of you will be on, right? *WFA*

Perfect. I'll send over the Zoom link — can you add it to your calendar so we're all set? *WFA*
Thanks so much for helping me out! I'll see you [Day] at [Time].

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### Favor Appointment Setting Script — Promotion Version

Hey [Name], how are you? How's the family doing? *WFA*

So the reason I'm calling is because I'm working on getting a promotion and I'm going through a training program. I have to learn how to give a presentation. So I wanted to see if you could help me out with that? *WFA*

Great! All I need is 30 minutes. And just so you know, it's just going to be financial education, so the more questions you ask, the better for me. Okay?

So as far as getting together — which one works better for you and [Spouse's Name]? *WFA*

Got it. Would [Time] or [Time] be better? And both of you will be on, right? *WFA*

Perfect. I'll send over the Zoom link and confirmation. Thank you so much for helping me out — it really means a lot. I'll see you [Day] at [Time].


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# Most Common Objections and Questions

When you get an objection, you don't have to give a magical answer, you just need to give an answer and go back to setting the appointment. Remember, your goal is to just set the appointment.

**Process to handle objections:**
**Affirm -** "Thank you for bringing that up"
**Answer -** "It's financial services"
**Close -** As far as us getting together, what day was better for you again?"

**1. What is it?**
It's financial services. I'm still learning all the different ways we help people so that's why I want to meet with you, is that okay?
(**Go back to setting the appointment**)

**2. What is it exactly you're doing?**
Thanks for asking, basically, we're helping people get rid of their debt, save money on taxes, and save money on their insurance, then, we help them use those savings for things like kids' college, retirement, or starting a business. It's actually pretty awesome so that's why I want to meet with you, is that okay?
(**Go back to setting the appointment**)

**3. What's the name of the company?**
I'm independent and I'm partnering with over 20 companies. You've probably heard of some of them like Fidelity, Lincoln, and Invesco, do you recognize any of those?
(**Go back to setting the appointment**)

**4. I don't know if (SPOUSE) will be available so I'll call you back**
I really appreciate you bringing that up because I definitely do want her to be there. But listen, generally, when are you two usually together? Let's do this, my trainer is really busy and I want to make sure he's/she's available when you call me back. How about we schedule it for (DAY) and after you talk to (spouse) if that doesn't work, call me back and we'll move the date, fair enough?
(**Go back to setting the appointment**)

**5. I already have (Insurance/investment/advisor/etc.) so I'm ok.**
That's awesome! Like I said, it's just training, and since you already have something you'd be doing me a huge favor by letting me practice with you. Is that okay?
(**Go back to setting the appointment**)


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**6. I'm Busy**
Thanks for bringing that up, usually when people tell me that it's because they think I'm going to waste their time, is that how you're feeling?(wait for answer)
How about we do this, let's meet up and after 15 minutes if you don't feel like what I'm doing is valuable, we can just stop, is that okay?
(**Go back to setting the appointment**)

**7. I've sat with someone from primerica**
That's great, so you're already a client? (wait for answer)

IF NO: You must have had someone who didn't know what they were doing, I promise you, when you look at what I show you you're going to see a ton of value. Is that okay?

IF YES: Awesome, I still wanna come by and chat and maybe you can refer me to someone who might be interested. Is that okay?
(**Go back to setting the appointment**)

**8. I'm not interested**
Thank you so much for bringing that up. Like I said, you may not not be interested, but for sure somebody you know would benefit from this. Give me 15 minutes. If in 15 minutes, it's not interesting to you, we'll stop. Is that fair?
(**Go back to setting the appointment**)


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