**Introduction Process Scripting**

*Look at the agenda for your meeting and point to the item on the agenda when you begin speaking about the Introduction Process.*

*This scripting should take about 30-60 seconds.*

* [CLIENT], now that we will be working together, I am going to briefly explain what my Introduction Process is.
* Over the course of our relationship, it is very likely at some point that you will encounter someone who has need of our services.  Someone you know may have uncertainties about the markets or their portfolios, perhaps they are going through a Critical Financial Event like we discussed, and there is uncertainty about that. Or, maybe they are dissatisfied with their advisor.
* If that situation happens, and historically speaking, my experience tells me it will, you should know that if that person is important to you, then they are important to me.  I will always make the time to meet with them.
* There is no guarantee that this person will be a good FIT for me as a client, but that is irrelevant. I will meet anyone that is important to you, and if it turns out **not**to be a good FIT, I will do everything I can to point that person in a direction that **is** beneficial to them.
* Regarding how to handle it if you **do** encounter someone that might benefit from our services, really, the best thing to do is for **you**to give me a call, let me know about who the introduction is and their contact info., and of course to let them know I will reach out to them as soon as that is convenient. I will also send them out an Introductory Kit as I did for you.

*(If you do not have an Introductory Kit then eliminate that last bit from the script. You will be creating an Introduction Kit in this program.)*

* Do you have any questions [CLIENT]?”