# Insurance Policy Delivery Meeting Confirmation Call Script

**Client Onboarding STEP 16**

Use the following telephone script as a guide to assist you with confirming the Policy Delivery Meeting – regardless of whether it is in person, virtually or over the telephone.

* May I please speak with [Potential New Client] please?
* This is [Your Name], the Insurance Advisor calling from [Organization].
* I'm calling to confirm our appointment at [time], on [date].
* Just a reminder, this has been set up as an [In-Person Meeting/Virtual Meeting/Telephone Meeting].

**Review any instructions related to mode of meeting (i.e. Confirming the best number to reach them at that time OR Confirming they’ve received the link to the Virtual Conduit).**

**Answer questions appropriately.**

* Thank you [Potential New Client].
* I look forward to meeting you.