**Implementation Meeting Confirmation Call Script**

**Client Onboarding STEP 10**

Use the following telephone script as a guide to assist you with confirming the Implementation Meeting.

If Financial Planner is making the call:

* Hello, may I please speak with [New Client Name] please?
* Hello [New Client Name]. How are you today?
* This is [Your Name] calling from [Credit Union/Organization].
* I'm calling to confirm your appointment at [Time and Date].
* I will be presenting your Personal Financial Organizer and begin the process of implementing of your financial solutions.
* Please bring your [identify any documents that you require to begin implementation].
* I look forward to seeing you at [Time and Date].

If Assistant is making the call:

* Hello, may I please speak with [New Client Name] please?
* Hello [New Client Name]. How are you today?
* This is [Your Name]. I am [Financial Professional's] Assistant calling from [Credit Union/Organization].
* I'm calling to confirm your appointment at [Time and Date].
* We will be presenting your Personal Financial Organizer and begin the process of implementing of your financial solutions.
* Please bring your [identify any documents that you require to begin implementation]
* We look forward to seeing you at [Time and Date].