**Introduction Script Samples**

Use these scripts to develop an introduction process you are comfortable using as follows:

* During the Fact-Finding Meeting of the New Client Process.
* Modify to use at the start of every meeting with a client.

**Introduction Script 1**

Preamble

* [Client Name], you’ll remember at our first meeting, I told you I would review with you the process our clients follow when they want to introduce a friend or family client to me. Please understand, I’m not asking you to think of any one right now.

Qualifier

* I would like you to know that we are very comfortable with the fact that as financial planners we cannot be all things to all people.
* The people who work with us have the desire to take the actions required to get results and, of course, there must be a fit.

Steps

* When you are speaking with someone whom you feel would benefit from working with us, share with them what you like about working with us.
* With their approval, call us with their name and phone number.
* We will first make an initial contact call and then send an introductory kit that will be followed up with a phone call to arrange a meeting to determine fit.

Positioning

* Be re-assured that we will treat them with the same respect we treat of all our clients.
* And, I hope you will understand if I feel that another financial professional at [Credit Union/Organization] can better meet their needs, I will be making an introduction so that your friend/family client is taken care of.

**Introduction Script 2**

Preamble

* [Client Name], at this point I would like to review our introduction process with you.

Qualifier

* One of the services I offer is that as a client of mine you have the opportunity to introduce us to friends, family and associates so they may also take advantage of the same type of service you will benefit from.

Steps

* As you know I/we cannot be all things to all people and any new clients will go through a FIT process to ensure we can work together in a spirit of mutual trust and respect for a long time to come.
* When you are speaking with someone whom you feel would benefit from working with us, share with them what you like about working with me at [Credit Union/Organization].
* With their approval, call us with their name and phone number.
* We will first make an initial contact call and then send an introductory kit that will be followed up with a phone call to arrange a meeting to determine fit.
* This sheet [*give them Introducing Others to ...*] will remind you of the steps to follow when you want to introduce people to us.

Positioning

* Regardless of the outcome of our first meeting, whoever you introduce me to will receive the same professional and respectful treatment you are accustomed to.
* If there is not a FIT with respect to the full financial planning services I offer, I will ensure they are introduced to the financial professional at [Organization] who is best suited to meet their needs.
* Either way, they will be well looked after.
* Do you have any questions about our Introduction Process?

**Introduction Script 3**

Preamble

* [Client Name] I want you to know that as a client of mine, you will receive a variety of value-added services. One of those services is that I will make myself available for friends and family clients of my clients.
* Please understand that I am not asking you to think of anyone right now; however, you may run into someone at some point that needs guidance or that is not happy with their current situation. If you do encounter someone like this, and you feel that I may be of assistance, I have a process that will help you in that situation.

Qualifier

* First of all, you should be aware that someone you introduce to me may not find us best suited to meet their needs. It must be a good fit for them.
* That said; I will always meet with anyone that you introduce me to and make myself available to answer their questions. If that person is important to you, then they are important to me. I will make the time to meet with them, even if it is just for the reassurance that comes with a second opinion.
* I will always introduce them to the financial professional at [Credit Union/Organization] who is best suited to meet their goals and objectives.

Steps

* If someone does ask you about me or you feel someone could benefit from the work we have done together, with their permission, give me a call with their contact information. I will then touch base with them, arrange to meet and send them my introductory kit to outline who we are and what we do.
* This sheet [*give them Introducing Others to ...*] will remind you of the steps to follow when you want to introduce people to us.

Positioning

* Regardless of the outcome of our first meeting, whomever you introduce to us will receive the same professional and respectful treatment that we provide all our clients. Again, if there is not a FIT with me personally in terms of financial planning, I will introduce them to the financial professional at [Organization] who is best suited to assist them.
* Do you have any questions?