# FIT Meeting Confirmation Call Script

**Client Onboarding STEP 5**

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

It’s highly recommended the Initial FIT Meeting is **in person**, so you have an opportunity to meet your clients face-to-face.

If, however, this is meeting is being conducted by phone or virtually, you will still confirm it and will additionally include details specifically related to the mode of delivery (i.e. Confirming the best number to call them at that time or Confirming they’ve received the Virtual Link).

* May I please speak with [Potential New Client] please?
* This is [Your Name], the Insurance Advisor calling from [Organization].
* I'm calling to confirm your appointment at [time], on [date].
* Do you have any questions about where our office is located or the availability of parking in the area?

**Answer questions appropriately.**

**If you are meeting at their location (home or office), be sure to confirm the physical address and ask about parking/directions.**

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