**Relationship Call Script**

This call is always based on the personal information in the Client FORM Information and should be made by the Advisor leading the relationship. This call is intended specifically for your high value clients.

**Relationship Call Script**

1. Introduction:
* Hello [High Value Client Name]. This is [Advisor] calling from [Team/Office].
* How are you?
* I was thinking about you (this morning/this afternoon), and I decided I would call to touch base. This is purely a social call [name of client], do you have a couple of minutes?
1. Family:
* How is your family doing? Is everyone well?
* How are the kids? [use specific names]
* Is school just starting/ending/graduating/university, etc.

*You will appreciate the notes you have documented. Collect and record any new information]*

* Are you planning any upcoming vacation time?
1. Business & Career:
* How are things going at work/in your business/ retirement, etc.?
1. Interests & Recreation:
* How is your golf game? Have you improved your handicap?
* Tell me about the Lakers. What are you expecting from them this year?
1. Conclusion:
* Reassure them that they can call anytime if they need anything.

**Relationship Call Message Script**

* Hello [Client Name]. This is [Advisor].
* It’s just a personal call. I am calling today simply to touch base with you to see how you are doing. Last time we spoke you [were about to head out on your trip to Australia] and I wanted to see how that went for you and the family.
* Please call if we can be of service. I look forward to connecting with you soon.