**Review Meeting Booking Script**

*This is the booking script for setting up Review Meetings with clients.*

*We recommend the Review Meeting is booked 1 week out from the date of this call.*

*As always, personalize calls based on FORM information you have.*

* May I speak with [Client's Name] please?
* This is [Financial Professional] calling from [Organization].
* The reason I am calling is to arrange your Review Meeting.
* Are you available during the week of the [month and date]?

*This time-frame should be approximately two weeks from the date of this call.*

*Through client conversation, determine a suitable day and time for the meeting.*

* Great [Client] – that day and time works for me too.
* You can expect this meeting to be about one hour.
* Before I go, do you have any other questions [Client]?
* Great - thank you for your time.
* I look forward to seeing you on [date and time].