



It Begins and Ends with the Financial Review



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Why the Beginning and the End?

Greeting

1. Client/Member waiting in lobby
 - a. Approach client/member
 - b. Make eye contact and smile
 - c. **Introduce self**
 - d. Shake hands
 - e. **Ask for name – how may I assist?**
 - f. Escort to desk
 - g. Offer seat

Scriptwriting on introduction and asking for the name

Pre-Positioning

1. Provide a transition to Reactive Probing Questions
2. Provide a differentiation statement
3. Provide your role as the professional
 - a. Future contacts
 - b. Questions



Scriptwriting for transition using a reference to the inquired product

Scriptwriting for differentiation statement

Scriptwriting for your role as the professional (include future contacts and questions)

The Core of the Financial Review



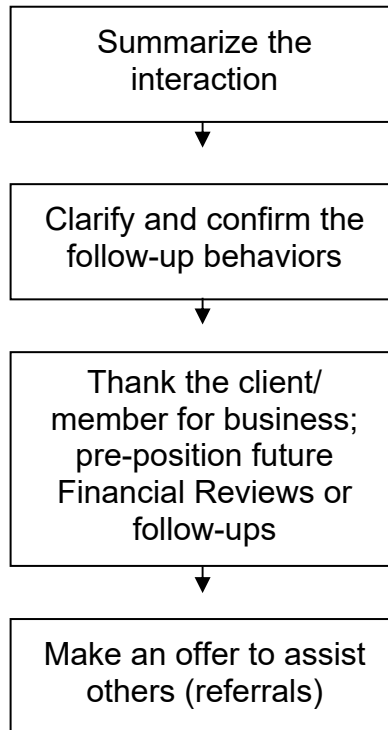
Client/Member Orientation

The Cohen Brown Law

“It is never the client’s/member’s or prospect’s responsibility to ask you, to tell you, or to understand anything about your products and services – ever. It is your responsibility to educate them.”



Conclusion



Summarize the interaction

Clarify and confirm follow-up behaviors

Thank for the business, pre-position future Financial Review or follow-ups

Offer to assist



Put It All Together

Take-Aways

