

REFERRAL PHONE CALL TEMPLATE

Hi (Prospective Client's Name), this is (Your Name), I am following up on an email I sent you the other day, did you receive it?

That's great. Did you have a chance to speak with (Existing Client's Name)? As my email stated, (Existing Client's Name) is a client of ours and they thought it was a good idea for me to reach out to you and for us to get connected.

Perhaps (Existing Client's Name) mentioned it but in the event they did not, we work with a very unique and specialized process that helps people increase their wealth building potential on top of what they are presently doing.

The best part is, we are able to accomplish this without additional out of pocket outlay on your part and with less risk than you are presently exposed to.

I'm looking for 30 minutes to sit down with you and show you our process and to see if you find value in it for you? How about one day next week during your lunch hour, maybe Tuesday or Wednesday?

Great, I have us down for 12 Noon next Wednesday at (Meeting Place). What I am going to do is send you a confirmation email with my contact information in the event you need to contact me.

I am also going to mail you a confidential Questionnaire that we utilize so you can see what information we would be looking for should you decide to proceed. It is not necessary for you to fill this out in advance of our meeting. However, if you have the opportunity to gather a few items together that would be a great start.

I look forward to meeting you next week.