

PROSPECTING DIALOGUE COMPONENTS

Lead-ins

- *I help my clients... state features such as greatly increase your wealth, reduce your taxes, and protect you against wealth eroding factors.*
- *After working with me, my clients feel... state benefits such as they are able to receive clarity regarding their financial decisions and confidence they are on the right track.*
- *I specialize in working with my clients to... state features and benefits.*

Using a combination of the above, here are several examples of what a lead-in may sound like:

I help my clients implement financial strategies that enable them to build additional wealth and protection.

I help clients clearly visualize, organize, protect and grow their entire financial life using a unique time-tested model and financial rulebook that, when followed, create financial stability, protection, and opportunity.

I have the greatest, most satisfying job in the world. I get to travel and work with people just like you. Together, we implement financial strategies that enable them to build and enjoy more happiness, success, and wealth.

I work with ordinary people... to help them become millionaires. I also work with millionaires... to make sure that they do not become ordinary people!

I work with business owners and professionals using a unique step-by-step process in three ways: reduce taxes, making sure proper protection and benefits are in place, and ensuring benefits transfer to future generations. My clients feel confident knowing they're on the right track.

I help my clients better understand money... how it works, how to protect it, how to grow it, how to enjoy it, and how to preserve it for generations to come.

Engagement Questions

- *What are some of your priorities regarding X?*
- *What are some of your challenges with X?*
- *What would you ideally like to change regarding X?*
- *What if it turned out that we could do X for you?*
- *What if I could measure and receive feedback about your current financial decisions?*
- *What if you could test a variety of financial strategies to see if there were alternatives that offered enhanced results?*
- *What if I could create safeguards around your assets and income to insulate you from future financial losses due to taxes changes, market fluctuations, even your own unforeseen circumstances... all while making this easier and more accessible to you. Do you use anything like that today?*
- *Of what I said, what might be of interest to you?*

Call to Actions

- *If we really could do X, Y and Z, what would your thoughts be on having an initial conversation with me to hear more?*
- *What would your thoughts be on having an initial conversation with me about X? What is your availability over the next week?*
- *would love to have an initial conversation with you about X. What is the best way to get on your calendar?*