CLARITY MEETING SCRIPT

INTEGRATED ADVISORY

LEADING CPA FIRMS UNDERSTAND THE POWER OF INTEGRATION

WE INTEGRATE THE FUTURE OF CLIENT NEEDS INTO THE HISTORY OF CLIENT RELATIONSHIPS

"Hi (Client Name),
I spoke with (Trusted Advisor) from our firm, and he/she asked that I reach out to you. As (Trusted Advisor) may have mentioned, I lead the team responsible for managing the Integrated Wealth Planning process for our clients at (Firm Name).

The reason for my call today is to connect with you to schedule a Clarity meeting – the first step in our Integrated Wealth Planning Process. As you are likely aware, there is no charge for the Clarity meeting, as the purpose is to gain a deeper understanding of your current advisory team, your personal goals, dangers, opportunities and strengths. Understanding this helps us both to explore if there are opportunities to work with you under an Integrated Wealth Planning model.

On average, a Clarity meeting takes between 60-90 minutes, and can be held at our office or at a location that is convenient to you. Is there a day and time that works best for you?"

(WAIT FOR CLIENT RESPONSE 1 or 2)

If yes and date determined, then:

"Thank you for taking the time to speak with me today. I will send you a follow up email to our call confirming the date, time and location of the Clarity Meeting. The email will also include a link to a brief Scorecard that takes less than 5 minutes to complete. We would ask that you complete it in advance of the meeting, as it will provide a starting point for our discussion. In the meantime, if you have any questions regarding the process, please do not hesitate to reach out to me. My contact details will be in the email. Looking forward to meeting with you."

If objections, then:

To address anticipated objections that come up during the call, utilize the Ground Rule tool:
1.) Listen for value or something you can agree with,
2.) Feedback value/agreement first,
3.) Ask a question (provide information first if necessary).

See Anticipated Objections List for examples that come up through the process and how to apply the ground rule.

If able to resolve objection go back to point 1. If unable to resolve and client is not comfortable, they may not be a fit for this model. However, you want to close the meeting by keeping the options open as follows:

"Thank you for taking the time to speak with me today and for sharing your thoughts. I want to reiterate the option for a Clarity Meeting is always open to you should you change your mind. If you have any further questions or concerns regarding the process, please do not hesitate to reach out to (Trusted Advisor) or myself. I look forward to an opportunity to meet with you in the future."

Follow up Email Confirming Appointment

"Hello (Client Name),
Thanks again for taking the time to speak with me today. Excited about our Clarity Meeting scheduled for (Time) on (Date) at (Location).
As discussed with you, please see below for the link to the Financial Mindset Scorecard. The scorecard should take you less than 5 minutes to complete. We would ask that you complete in advance of the meeting, as it will provide a starting point for our discussion.

INSERT LINK TO FINANCIAL MINDSET SCORECARD

In the meantime, if you have any questions regarding our process or the Clarity Meeting, please do not hesitate to reach out to me.
Once again, we look forward to better understanding what is important to you as we continue to deepen our advisory relationship.
Sincerely,
(Integrated Wealth Planner)"

Clarity Meeting Email Reminder (48-hours in advance)

"Hi (Client Name),
I look forward to our upcoming Clarity meeting at (Time) on (Date) at (Location). If you have not done so already, please be sure to take a couple of minutes to complete the Financial Mindset Scorecard prior to the meeting, as it will serve as a starting point for our discussion. Should you need it, I have provided the link below for your convenience:

INSERT LINK TO FINANCIAL MINDSET SCORECARD

If you have any questions or if there is anything I can help with prior to the meeting, please let me know.
Sincerely,
(Integrated Wealth Planner)"