

ECS SCRIPT

So the one of the last things we have to do is put together your emergency contacts, and basically all that means is everyone's heard the story where someone dies and the insurance company never pays, and it's not because they didn't want to, it's because no one knew where the policy was, who it was with, or sometimes the family didn't even know there was a policy!

But thank God our company created a program to make sure that doesn't happen to any of our clients! The way that works is really simple.

All we're going to do is put together a list of 10 local friends and family you trust, I'm gonna make sure they have my name and cell phone number in a safe place so that God forbid, something happens to you, they can call me immediately, and I can get that money out to your family ASAP!

So who would be the first person? And then? Next? Etc.

(If they can't get to 10 people, say this):

Hey CLIENT, we're talking on your cell phone correct? Ok, do me a favor really quick, and put me on speakerphone. Now go to your most recent call list, and start naming the last 10 ppl that you called. Great, what's each of their numbers?

(After you have list)

So I'm gonna call these people and make sure they have my information, but of these people blank, how many of them do you think I'd benefit from the information on insurance that I just helped you out with, probably all of them right?

A: Yes all of them

Great! I gonna get that done for you today, have an awesome rest of the weekend!

A: Maybe not X person

Well it couldn't hurt to ask, could it?

A: No, couldn't hurt!

Great! I gonna get that done for you today, have an awesome rest of the weekend!

GOOGLE REVIEW SCRIPT

We are really trying to build our online presence so we can help more amazing families like yours, so can you do me a huge favor and leave us a WRITTEN 5 Star google review, and please mention my name so that my boss knows I'm doing a good job taking care of my clients!

Ok, I'm going to text it to you now and I'll walk you through it, because I know sometimes there can be technical difficulties!

(HERE IS THE EXACT TEXT TO SEND, PLEASE COPY AND PASTE):

Please leave a written 5 ★ review! 🙏

<https://g.page/r/CTx8QFbk3TN4EAE/review>

BAMFAM OPTIONS:

Multiple scenarios can occur from them filling out the Wealth Investigator, I will go through how to respond to each:

- a) They don't have anything listed on the Wealth Investigator:
 - i) No need to book a secondary appointment

- b) If the client has more than one thing filled out on the Wealth Investigator, then the order of importance should go as follows:
 - i) Annuity, IUL, Debt. We will capture ALL of the business that they qualify for, but for the purposes of setting another appointment from this call, you only set it talking about ONE THING ONLY.

- c) They said that they have an old retirement account (ANNUITY):
 - i) Hey CLIENT, I don't have time right now, but I know you mentioned you have this old retirement account. If there was a way you could put that money away, and it could continue to go up when the market goes up, but NEVER lose money again when the market gets down, would you be opposed to hearing about that? Ok great, if this time works, why don't we get back together at the same time tomorrow?

- d) They are UNDER 50 YEARS OLD and there is a discrepancy between how much they contribute to their current 401k, and how much their employer matched them (IUL). (Ex. The client contributes 10%, but the employer only matches 4%):
 - i) Hey CLIENT, I don't have time right now, but I know you mentioned you are contributing more to your 401k than you're being matched on. What if there was a way where you could put that extra money that you're NOT being matched on in a place where it could grow with NO TAXES as opposed to tax deferred. Would you be opposed to hearing about that? Ok great, if this time works, why don't we get back together at the same time tomorrow?

- e) They said that they have debt (DEBT):
 - i) Hey CLIENT, I don't have time right now, but I know you mentioned you have this credit card debt. If there was a way you could lower your monthly payment on that significantly, would you be opposed to hearing about that? Ok great, I just have to schedule a time for you to speak to them. What time do you get off of work tomorrow and next day that would be best for you? (Schedule them in the Weightless App)