**Phone Script to Existing Clients:**

Mr/Mrs client, I am reaching out to you today to reassure you that your portfolio is doing just fine! I wanted to remind you that we built your retirement plan so that even if the markets go crazy…you will still be able to accomplish your goals in retirement and achieve your highest retirement values.

You are just fine. (give them some insight on their portfolio using the spreadsheet we sent over, if necessary)

The other reason I am calling is that your family, friends, neighbors and coworkers are really hurting and need the peace of mind you have! I would like for you to introduce me to these people you care about so we can help them as well. Think of your family, friends, coworkers, neighbors, or people you go to church with.

Who immediately comes to mind?

Would it be okay if I call them?

Would you mind letting them know that I will be calling them so they will take my call?

Who else comes to mind?

Of these names you have given me…who would be most likely to take my advice?

Thank you so much for your help! Again…if you could please let these people know I will be reaching out I would greatly appreciate it. If anyone else comes to mind…just email my office and we will get in touch with them. Thanks!