**Fact-Finding Meeting Confirmation Call Script**

**Client Onboarding STEP 8**

Use the following telephone script as a guide to assist you with confirming the Fact-Finding Meeting.

* May I speak with [New Client] please?
* This is [Assistant] calling from [Financial Planner's] office at [Organization]. I'm calling to confirm your appointment at [time, on date].

OR

* This is [Your Name] calling from [Organization]. I am calling today to confirm our appointment at [time, on date].
* We will be completing your Personal Financial Profile at this meeting, so you will need to bring some documents with you so that we can refer to them.
* Did you get the checklist we mailed to you?
* If yes: Great, do you have any questions about this list? Have you had trouble getting any of the documents together? (If yes, then help to troubleshoot, and/or consider rescheduling appointment.)
* If no: Confirm address, resend checklist and reschedule appointment for later date, saying:
* “Let's reschedule the appointment, then, so you have some time to get the documents together."
* I look forward to seeing you at \_\_\_ time, on \_\_\_ date.
* Have a nice day.