10 CRITICAL POINTS

That Top Producers Cover in Their Seminar and Webinar Presentations to Convert Even More Appointments

After launching over 1 Million consumer campaigns and attending over 500 events, we have gathered the Top 10 points that have proven to convert more appointments to sales if covered in the initial presentation whether it be one-on-one, online, or in a group seminar.

1 - What is the most successful outcome you have produced for a client?

Tell one of your favorite success stories that will help you build credibility and compel your audience to see what you can do for them.

2 - Who would benefit from a meeting with you? What type of financial scenarios do you work with?

They're seeing if they fit into your typical client base. Make sure they know they do.

3 - What education or professional designations do you have?

If you've got it, flaunt it.

4 - How often do you meet with clients?

Be honest. Manage expectations.

5 - If I am not happy with my current advisor is there a way to transfer or move my money without having to contact them?

Explain that the industry has specifically created a process, called ACAT Transfer, knowing that it is difficult and awkward to do that.

6 - Do you work with an Attorney or CPA and do you have access to other resources to help me?

If the leave their current advisor to work with you, they will likely need to give up the relationship that advisor offers. Make sure you can provide support for whatever they may need to the transition is easy.

7 - How do YOU get paid? Is there a charge for the meetings?

Again...be honest! If you make a commission on the product, that's ok. But be sure they know the meetings are complimentary.

8 - What if I already have an advisor or professional that is currently giving me advice, how can I work with you?

This one is up to you. If you partner with other advisors, let them know that. if not, make sure they know there are likely things you can share with them that their current advisor isn't currently covering.

9 - What happens at the first appointment when we meet with you? Do I need to bring something?

Whether you ask for their bucket list, their main concerns, or their full portfolio, let them know ahead of time.

10 - How Much In Retirement Savings Do I Have To Have To Work With You?

Do you work with a wide scope of portfolios or the top few? This is your chance to accept everyone, set a range, or narrow down to a specific group.

Start filling your calendar with more qualified and motivated prospects TODAY

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