SAMPLE POST-WEBINAR

CALL SCRIPT

For use with Stonewood's Automated Webinar Program. Questions about incorporating these ideas into your sales process? Email support@stonewoodfinancial.com

- Hello [introduce yourself]
- I'm calling to thank you for joining our webinar on taxes in retirement. Our phone has sure been ringing today with all the great feedback from attendees.
- Did you have a particular takeaway that was most valuable to you?
- [Get response]
- The reason for my call is: Many savers have never analyzed their potential tax bill in retirement, and I want to make sure you got your complimentary analysis.
- Would you be open to scheduling a 15-minute call? On the call, we will get a few pieces of information from you - nothing you need to prepare in advance, just things like how much of your retirement asset you'd like us to evaluate and what kind of tax rate you'd like us to use.
- Then, we can run your custom report and discuss the results with you.
- [Get feedback]
- Great! We are excited and prepared to take care of you.