

Referral Give Back Script

“I cannot wait to take care of you and your retirement accounts for your future.

And, as part of our client give back program, the company requires me to give away five Starbucks cards with every teacher I help.

I’d like to give these gift cards to people **you** know, who would you like me to give them to?”

-
- Name
 - Phone Number
 - Email
 - Relationship



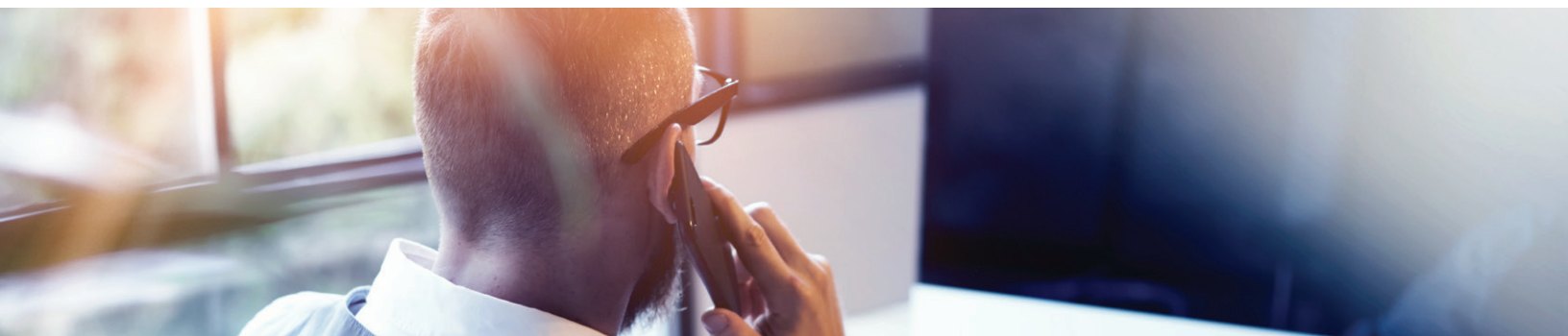
Call Referral For Appointment

"Hi Mr./Mrs. _____, this is _____ with _____.
You were nominated by your friend _____ to receive a Starbucks gift card and I wanted to send that to you today. What is the best email to send your gift card to?

Awesome! I also want to make sure you get the same retirement information that _____ received from us. As an employee of _____ school district, you are entitled to a pension and retirement benefits review. You probably received an email recently about it.

The meeting usually take about 30 mins. We do them virtually which makes it convenient for you. I have _____ and _____ open this week, what day and time works best for you?

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- Set the appointment
 - Update CRM
 - Email gift card
 - Email Zoom Link



Confirm PERA Appointment

Hey _____, this is _____, we have an appointment scheduled to go over your pension on Thursday at 3 PM. Just reaching out to confirm if that time still works best for you?

Ok great! We will have this appointment on Zoom so I will send you the Zoom link now, can you confirm the best email address for me to send this to?

Perfect. To make best use of our time, please have your paystub available along with any other documents you'd like to review.

While I have you on the phone do you have a minute to get some basic info so that we are prepared for your meeting?

- How long have you been part of the state pension system?
- What's your age? When's your expected retirement date?
- Are you currently contributing additionally to a deferred compensation, 403b or 401k plan?

Thanks. Please make a reminder for Thursday's appointment at 3pm have a great week!

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- Remind the appointment
 - Update CRM notes
 - Email Zoom Link



MoZone Phone Script

Hi is this ____? This is _____. I'm calling because you responded to an email that was sent to you at school requesting to have someone come out and do a pension review for you. It looks like the appointment never took place, so I wanted to confirm that you are still with the district and get you back on the calendar for your pension review. We are doing these meetings on Zoom and they usually take 30 min.

***If they say... Ok, Blank Pause, etc....
Keep the conversation going with...***

Are you still with _____ school district?

YES, same district

Great! And the email address that I have for you is _____. Would you like me to use that email or would you like me to save a personal email on file for you? I will send you the zoom link to that email now.

Perfect, I have ___(day) and ___(day) this week available, what day and time works best for you? Great! I will send you a text confirmation to remind you the day before.

I look forward to talking to you on ___ (appointment date and time).



MoZone Phone Script

NO, different district

Ok, are you retired or with another district?

Retired

Awesome! Congratulations, there are still benefits that you are entitled to now that you are retired. We can set a time to call you and do a phone review of the information that would pertain to you as a retired employee. It's very informative. What day and time works for you?

Another District

Ok Great! What district are you with now? I see your email address is _____. Do you have an updated email that we can save since you are no longer with _____ district?

Perfect, I have ___(day) and ___(day) this week available, what day and time works best for you? Great! I will send you a text confirmation to remind you the day before.

I look forward to talking to you on ___ (appointment date and time).



MoZone Phone Script

Who are you?/What do you do?

A) I am a state licensed agent with _____ I am contracted with the approved vendors in your district to help you understand your state pension information and retirement benefits. Our goal is to educate you on how your pension works and explain the retirement benefits you are entitled to.

B) We are an approved vendor with many of the school districts across the country, authorized to educate teachers and school staff on their state's pension system. It's a very informative meeting aimed at educating you on your state's pension system as well as other district approved plans that you are entitled to.

C) The difference between working with us and contacting the pension directly is that we will give you all of your pension figures and estimates as well as help you understand and strategize on how to maximize them. The pension doesn't help you strategize and the information they provide is limited solely to the pension. We will discuss all of your options and really help you put all the pieces of the puzzle together

I already have an advisor

Perfect that's exactly what we are here for, the representative will go over your plan and show you how it is working in conjunction with your pension and other benefits that you are entitled to.

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