AFEA Free Consultation & Strategy Session Disclosure Script

Use this script to help students understand why they are signing the release document and help you transition to your for-profit advisory services. This can be done at the beginning or as the trainee starts to bring up specific questions where your answers would require you to go outside the AFEA realm of responsibility (general education about concept and products). It is mandatory to get signed for the Trainee to receive any free reports from you as specialized free reports are considered advice and/or recommendations which AFEA representatives cannot give.

Mr. & Mrs. Prospect:
Before we get started with your free consultation, I have some housekeeping requirements to take care of for AFEA. As you know AFEA is a nonprofit organization that offers General Education only. They do not offer specific product recommendations or advice.

During this consultation you may ask that I make suggestions and advice based on your actual circumstances and assets.
Signing this form releases AFEA and its affiliates from any of the recommendations that I may provide you.
It was written by an attorney so I apologize for the legal terminology!
Give your prospects a chance to read it and then begin the consultation as you normally would all first meeting consultations.

****Note – The AFEA Free Consultation & Strategy Disclosure form is a mandatory requirement that must be signed by you and your students and kept on file for each strategy session/consultation conducted from an AFEA workshop or Course.**
Please fax all signed forms to 877-459-2217 on the 1st and 30th of each month.
To Your Success!
Team AFEA

Strategy Session Transition and First Question Script

Mr./Mrs. *(First or Last name depending on the relationship you have with the Trainee);* **this strategy session will be utilized to assist you in gaining a better**

understanding of how the material covered during the workshop pertains specifically to your situation. I acknowledge there may be specific needs and concerns you would like addressed, and I am here to assist you with moving towards your personal, financial goals. So, feel free to ask any questions you may have during this time.

(Pause and allow them time to get comfortable, ask any questions, etc.)

To begin our session, it is important to me that I provide you with the appropriate information and report(s) that will assist in you achieving your financial goals. With this in mind, what is your expectation for this session today? What information would you like to obtain in assisting you with your retirement planning? How do you see the free reports mentioned during the workshop helping your current retirement plan? (allow them time to tell you what it is they need … they may even ask for suggestions, but give them time to talk and be heard).

(As you are answering their questions or making general suggestions, begin with this statement) …

I'll be glad to assist you with this. As you know, there are numerous, free reports that you can obtain out there today. Often times these reports do not really help you, they are more of a marketing gimmick than anything else. However, working with AFEA, our goal is to make sure you receive information that is conducive to your financial needs and to make this a meaningful experience for you. In order to do this, I am going to need your help in obtaining certain information that will enable me to customize the report to your needs and concerns. Will that be ok with you?

(wait for response and let the conversation that follows dictate the rest of the Session)

(At the conclusion of the Strategy Session you should schedule the Trainee to come back for a 2nd meeting to get their free report. The reason for them coming back is that you want to take your time and research their situation with the information they provided and make sure that the report you provide them is indeed meaningful and can help them.)