



Practice Makes *Perfect*

Workshop Appointment Setting Cheat Sheets

It can be challenging calling workshop prospects to convince them to schedule an appointment. It's amazing how many excuses they can come up with to try to postpone setting the appointment!

I have created a simple cheat sheet for each type of workshop to use as a reference while making those calls. I recommend you print them out and have them in front of you for quick reference, as they can give you the ammo you need to get that appointment scheduled. Each workshop topic has key selling points of why they should schedule an appointment and what they will get out of that meeting.

Social Security – Appt. Call Cheat Sheet

Selling the Appointment:

We will run our **expensive maximization software**, to potentially get you an **additional \$100,000 in benefits** over the course of your lifetime!

- **When to take** Social Security
- How to **reduce your taxes**
- How to **receive additional benefits**

RMD – Appt. Call Cheat Sheet

Selling the Appointment:

- How to **calculate your RMDs**
- When you need to **start taking RMDs**
- **Tax-Saving Strategies**

Most importantly, learn how to **avoid the largest IRS tax penalty of up to 50%!**

Estate Planning – Appt. Call Cheat Sheet

Selling the Appointment:

- **Advantages and Disadvantages** of Wills and Living Trusts
- How to **protect your family from Probate**
- How to **avoid huge attorney fees**
- (**Advisor**) can **get you a fantastic price because of his close relationship** with the attorney

IRA – Appt. Call Cheat Sheet

Selling the Appointment:

- How are IRAs taxed and how they could **affect your tax bracket.**
- What type of IRA is **most appropriate** for you.
- Whether your investments in your IRA are **designed more for growth or income.**
- What are **the benefits and risks** of Roth IRA conversions.

Adult Ed/ROP/Generic Topics – Appt. Call Cheat Sheet

Selling the Appointment:

- Review your current situation to determine if **your investments are suitable for your retirement goals**
- **When to take** Social Security
- How to **calculate your RMDs**

We will run our **expensive Social Security maximization software** to potentially get you an **additional \$100,000 in benefits** over the course of your lifetime!

For more information or to schedule a coaching call, please contact Daniela.