Financial Services Lead Generation Sample

Introduction (For All Scenarios)

Hi [Prospect's Name], my name is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we specialize in helping individuals and businesses with **financial services** like **investment strategies, retirement planning, wealth management, and tax planning**. I'd love to learn more about your financial goals and see how we can assist you in securing your financial future.

Would you mind if I ask you a few quick questions to better understand your financial needs?

Qualification Questions (For All Scenarios)

1. **Full Name**:
   Could you please confirm your full name?
2. **Financial Goals**:
   What are your primary financial goals right now? (e.g., retirement planning, wealth accumulation, tax strategies, investment management)
3. **Current Financial Services**:
   Are you currently working with any financial advisors or firms?
   - If YES: Who are you currently working with, and what services do they provide?
4. **Investment Interests**:
   Are you interested in specific investment strategies like **stocks**, **bonds**, **mutual funds**, or **real estate investments**?
5. **Retirement Planning**:
   Are you currently planning for retirement or need help with **retirement income strategies**?
6. **Business Financial Needs**:
   If applicable, do you need assistance with **business financial planning**, **tax strategies**, or **employee benefits**?

7. **Timeline for Decision**:
   When do you plan to make decisions regarding your financial goals?

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1. Callback Lead Handling (Financial Services):

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your financial needs and options in more detail?

Step 2: Schedule a Callback

- When would be a convenient time for our advisor to call you back and discuss your financial goals?
  - **Morning**
  - **Afternoon**
  - **Evening**

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
  - **Full Name**:
  - **Financial Goals**:
  - **Current Financial Services Provider** (if applicable):
  - **Investment Interests**:
  - **Retirement Planning Needs**:
  - **Business Financial Needs** (if applicable):
  - **Timeline**:

Step 4: Close the Conversation

- Great! You'll receive a call from our advisor [Advisor Name] at [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling (Financial Services):

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our financial advisors to discuss your financial goals and create a customized plan for you. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
  - **Option 1**: [Date/Time]
  - **Option 2**: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
  - **Full Name**:
  - **Financial Goals**:
  - **Current Financial Services Provider** (if applicable):
  - **Investment Interests**:
  - **Retirement Planning Needs**:
  - **Business Financial Needs** (if applicable):
  - **Timeline**:

Step 4: Confirm the Appointment

- You're all set for an appointment with [Advisor Name] on [Date/Time] at [Location]. Please let us know if anything changes.

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3. Live Transfer Handling (Financial Services):

Step 1: Live Transfer Introduction

- I can transfer you to one of our financial advisors right now, who can help you review your financial options and answer any questions you may have. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
  - **Full Name**:
  - **Financial Goals**:
  - **Current Financial Services Provider** (if applicable):
  - **Investment Interests**:
  - **Retirement Planning Needs**:
  - **Business Financial Needs** (if applicable):
  - **Timeline**:

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Advisor Name], who will review your options and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Advisor Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested**:

  "I understand, but having a solid financial plan is essential for securing your future. Would you be open to exploring some strategies that could benefit you in the long run?"

- **Already Have a Financial Advisor**:

  "That's great! Many of our clients already had financial advisors but found that we offered additional services or better investment strategies. Would you like to compare your current plan with what we can offer?"

- **Can't Afford Financial Services Right Now**:

  "I understand. We offer flexible financial services that can be tailored to your current budget. Would you be open to discussing options that fit your financial situation?"

- **How Did You Get My Information?**:

  "We usually receive information through online inquiries or directories that help individuals and businesses find financial services."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Financial Goals
3. Current Financial Services Provider (if applicable)
4. Investment Interests
5. Retirement Planning Needs

6. Business Financial Needs (if applicable)
7. Timeline
8. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you achieve your financial goals with expert advice and customized strategies. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!