Retirement Planning Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we offer personalized **retirement planning services** that can help you achieve your financial goals and ensure you're on track for a secure and comfortable retirement. Our retirement strategies focus on wealth preservation, income generation, and growth.

Before we move forward, I just need to ask you a few quick questions to better understand your needs and find the right retirement plan for you.

Qualification Questions (For All Scenarios)

1. **Full Name**:
   Could you please confirm your full name?
2. **Age**:
   May I ask your age to ensure we find the appropriate retirement planning strategy for you?
3. **Retirement Status**:
   Are you currently retired, planning to retire soon, or still a few years away from retirement?
4. **Retirement Savings**:
   Do you currently have retirement savings, a 401(k), IRA, or other investments that you're looking to manage or grow?
   - If YES: Roughly how much do you have saved for retirement?
   - If NO: Proceed to the next question.
5. **Retirement Goals**:
   What are your primary goals for retirement? Are you focused on **income generation**, **wealth preservation**, or **investment growth**?

6. **Timeline**:
   When do you plan to start withdrawing from your retirement savings, or are you primarily focused on growing your savings at this time?

---

1. Callback Lead Handling (Retirement Planning):

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your retirement planning options in more detail?

Step 2: Schedule a Callback

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

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
  - **Full Name**:
  - **Age**:
  - **Retirement Status**:
  - **Retirement Savings** (if applicable):
  - **Retirement Goals**:
  - **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!

---

2. In-Person Appointment Handling (Retirement Planning):

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed advisors to go over your retirement planning options and help you develop a strategy for a secure financial future. 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**:
  - **Age**:
  - **Retirement Status**:
  - **Retirement Savings** (if applicable):
  - **Retirement Goals**:
  - **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.

---

3. Live Transfer Handling (Retirement Planning):

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed advisors right now, who can help you review your retirement planning options and ensure your financial future is secure. 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**:
  - **Age**:
  - **Retirement Status**:
  - **Retirement Savings** (if applicable):
  - **Retirement Goals**:
  - **Timeline**:

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Advisor Name], who will go over your retirement planning 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 planning for retirement is one of the most important things you can do to secure your financial future. Would you be open to exploring some strategies that could benefit you down the line?"

- **Already Have a Retirement Plan**:

  "That's great! Many of our clients already had retirement plans in place, but we helped them optimize their investments or find additional income streams. Would you like to see how we can enhance your current plan?"

- **Can't Invest Right Now**:

  "I understand. Retirement planning can be flexible, and we can work with your timeline and budget to ensure you're on track. Would you be open to discussing options when you're ready?"

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

  "We usually receive information through online requests or databases that help individuals like you find retirement planning options."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Age
3. Retirement Status
4. Retirement Savings (if applicable)
5. Retirement Goals
6. Timeline
7. 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 secure a strong and stable financial future through effective retirement planning. If you have any further questions, feel free to contact us at [Phone Number]. Have a wonderful day!