

First Phone Call

FOR ADVICE CAMPAIGN

(DURING COVID-19)

Reaching out to COIs to offer pro-bono advice to their clients can be an excellent way to guide clients of your COI in need, fostering a positive relationship with your COI and establishing yourself as a compassionate leader. Consider informing COIs of your desire to do pro-bono work by reaching out in short (approximately 5-10 minutes) conversations, following the below scripting points:

INITIAL COI CONVERSATION EMAIL OR CALL SCRIPT:

1. Now more than ever people need trusted financial advice.
2. At a time when community is being challenged, and because not everyone has the benefit of or access to a trusted adviser right now, we want to be there for your clients during this challenging time.
3. While we do our best work with (insert target client profile), we always want to be your first call when it comes to clients needing financial advice.
4. To do our part to support our community of clients and professionals, we are making complimentary 20-minute calls available for any of your clients with questions or in need of a conversation and financial guidance.
5. This is a way for us to support you in helping your clients navigate these uncertain times. I know that some of those individuals with questions are not our typical client, and I want you to know that's okay. That does not mean we will not be here to help.
6. We will share a brief educational email, our contact information and free resources with you that you can send to any clients you feel would benefit from the opportunity to talk.
7. [If email:] I'll follow up with a call to share the message I am communicating with clients to bring them some comfort and talk with you about how we can support you and your client community during this market disruption. Then, follow up with a phone call or have your assistant reach out to set up a call.

FOLLOW-UP COMMUNICATION & CONTENT OPTIONS:

Follow up by sending an email communication letting the COI know how to reach you. The goal of this email is to create content that can easily be cobranded, allowing your COI to simply add their information and forward on to any clients in need of advice. Think of tools that COIs could use in conjunction with their content, such as a visually compelling PDF with a "join our mailing list" at the bottom.

Consider a catchy title (ex. *Chicken Little: Is it Really Different This Time?*) and include a video clip (using a tool like Loom or BangBang) with a short but potent message, some free resources and an offer to talk. Another idea is to offer to do a joint (virtual) presentation with your CPA to their clients on CARES and what it means to them. Record this session to either use as content for a podcast or article segments that can be sent to the COIs on a weekly basis (trust us, you have permission to communicate weekly!), reinforcing your message and value over time.

FINALLY:

Offer a follow-up webinar on the package/plan the government unveils and what it means (great topic for a CPA/FA presentation). People will want the simple English, straight-talk version and then more opportunities to follow up and deliver value.

Client Intelligence Form

Hello <COI Name>,

As we know, now is a time when people are concerned about a variety of topics—one of which is their financial stability and security. They need trusted advice now more than ever, but not everyone has the benefit of or access to a trusted adviser right now. Communities are being challenged to support these needs, and I personally want to make sure I rise to the occasion.

Generally, of course, I do my best work with <insert niche here>; however, I always want to be your first call when you have a client in need.

Given the greater strain of the community at this time, I would like to offer a complimentary 20-minute call for any of your clients with questions or in need of financial guidance. This is a simple thing I can offer to our community as we navigate these uncertain times. I expect that some of your clients with questions will not be our typical client, and that's okay. We still want to be here to help.

I'll follow up via phone to share the message I am going to be communicating with clients, as well as get a feel for anything on your radar that you think would be helpful for me to cover as we support our community during this market disruption.

All my best,

<Adviser Name>