

Help! What Do I Say?

Why we gather:

My two purposes:

What not to say

1. I'm _____
2. You have _____
3. At least, or be _____
4. Time _____
5. Anything having to do with _____
6. Call me _____
7. I know _____

What to say and do

When you take the client's hand

Stories

How to disengage

Getting introduced to or talk to other family members

Putting off business

Notes for files

Flowers?

Decide where to _____.

The importance of role play

Open-ended questions in follow-up appointments

Allowing for uniqueness

Every time you are together, let the client know the next time _____.

The roller coaster

Remember to say the _____.

Cards and touches

When to send

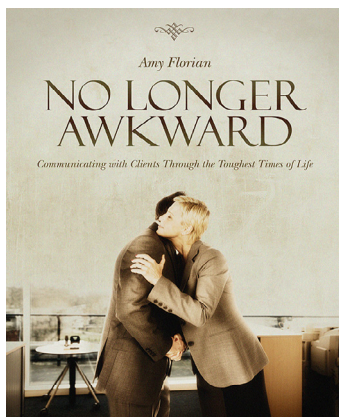
Authentic cards

Ideas for texts

Checking in with clients

Life is _____

Contact Corgenius to arrange sessions for events, study groups, in-office training and client appreciation seminars or to attend our multi-day class on client transition and loss.



Our Book is Available from Amazon.com.

“No Longer Awkward: Communicating with Clients Through the Toughest Times of Life.”

It is *the* definitive resource for financial professionals.