



Life Happens.®

PROSPECTIVE MEMBER PHONE SCRIPT

Good [MORNING / AFTERNOON], [PROSPECT FIRST NAME],

My name is [NAME], calling from NAIFA, the National Association of Insurance and Financial Advisors. I would like to speak with you for a few moments to learn more about you and your practice and see how a NAIFA membership would benefit you.

AND HERE'S WHY:

- You would become part of our national family of partners from all areas of practice and are represented in every single congressional district
- You receive access to educational opportunities that apply to all levels of experience
- And, we help you stand out from the other financial professionals down the street

Would you have a few minutes to discuss NAIFA and where you may fit in?

PROSPECTIVE MEMBER VOICEMAIL SCRIPT

Good [MORNING / AFTERNOON], [PROSPECT FIRST NAME],

My name is [NAME], calling from NAIFA, the National Association of Insurance and Financial Advisors. I would like to speak with you for a few moments to learn more about you and your practice and see how a NAIFA membership would benefit you.

Would you have a few minutes to discuss NAIFA and where you may fit in? I can be reached at [PHONE NUMBER] at your earliest convenience. Thank you and have a great day!