Introduction:
Your usual introduction…….
Also, along with mortgage protection, Me and my team assist our clients with all types of life insurance, estate planning, we help you with Tax-free growth with no losses in retirement planning.

On the Financial Inventory ask about 401k's , IRA's and so on….
Ask how much is in each account. If they are from a previous job or in an annuity.
Say, but you're wanting to use that for retirement, correct? Not an emergency fund. Is that growing nicely for you?   How do you feel about the recent loss on those accounts?
Would you be willing to talk to my teammate? He's an expert on retirement planning and we help a lot of people like you.
It will be just a short 15 minute appointment that will cost you nothing but could greatly improve your financial future. We can help you with tax free growth without losses so that you can protect that money you worked so hard for all these years. After, if you are not interested, then it will have only costed you 15mins. If you are interested, then we will schedule a longer Zoom meeting where he can go over your financial situation and all the benefits to you.
Set the 15 appointment on Calendly with DAVE.
Stress to the client:
David Pyle is a very busy man, and he can really help you improve your retirement years. This is one appointment you don't want to miss.