CLIENT CONFIRMATION VIDEO SCRIPTS

VIDEO #1 REGISTRATION CONFIRMATION

Congratulations, we have received your registration for the upcoming Retirement Shield class!

My name is......and I'll be your Retirement Shield host and presenter.

In our class we will address topics that will affect your retirement.

These topics include subjects like social security, income, impact of taxes, long-term care, and the what if's of life.

If you have any questions about parking and directions to the event location, feel free to call us at......

We look forward to having you there!

VIDEO #2 CLASS FOLLOW-UP FOR APPOINTMENT

Hi, My name is .... and I am the host and presenter of the Retirement Shield. Thanks for attending our class the other day!

I hope you found it educational and helpful when it comes to understanding your options around claiming social security and preparing for retirement.

If you find yourself wondering, what's the next step to make 100% sure you are prepared for retirement … I would like to offer you a personalized Retirement Shield Plan, at NO COST.

A Retirement Shield Plan will help answer your questions about what it means to be fully prepared for Retirement.

We do this by sitting down with you one-on-one where we can review your questions around the following topics:

1. When to claim social security
2. How to create income for life from your personal savings
3. Reducing the impact of taxes
4. Paying for potential long-term care costs
5. And last but not least…Learning how to protect your retirement money to withstand any market correction.

Call us at....to schedule a time to go over your Retirement Shield Plan.

Spaces are limited over the next couple weeks!

We appreciate the opportunity to help and we look forward to connecting with you soon!

VIDEO #3 Non-Attendee Follow-Up

Hi, My name is ...... and I am the host and presenter of the Retirement Shield! We got your registration to attend but it looks like you may have missed the class. Like most people who registered, it might be safe to say one of your biggest concerns is your social security income and how to claim social security to get the maximum benefit.

Though social security is a big piece of the retirement puzzle, it's only a part of it. To make sure you are getting the most out of your retirement, I would like to offer you a personalized Retirement Shield Plan, at NO COST.

A Retirement Shield Plan will help answer your questions about what it means to be fully prepared for Retirement. We do this by sitting down with you one-on-one where we can review your questions around the following topics:

1. When to claim social security
2. How to create income for life from your personal savings
3. Reducing the impact of taxes
4. Paying for potential long-term care costs
5. And last but not least…Learning how to protect your retirement money to withstand any market correction.

Call us at......to schedule a time to go over your Retirement Shield Plan. Spaces are limited over the next couple weeks! We appreciate the opportunity to help and we look forward to connecting with you soon!

VIDEO #4 Appointment Confirmation

Hi, my name is...... Retirement Shield host and presenter for the class you attended the other day!

We've confirmed your appointment on our calendar and I'm excited to sit down with you one-on-one to go over your questions regarding your Retirement Shield Plan!

Make sure to add the time, date and location of our appointment in your calendar as well. You'll find that information in the email that was just sent to you by my team.

In order to get the most out of our time together, make sure you've completed our online Retirement Shield survey by clicking the link that was sent you in a separate email or in this email message below. Also, make sure to have any social security statements, retirement account statements and financial documents ready at the appointment that you would like us to review!

If you have any questions, feel free to contact my team at _____.

Thanks again, I look forward to connecting with you soon!