Understanding Your Client Training Manual

National Financial Educators Council

Excerpt from the

Initial Meeting Script

This script is intended to serve as a framework. Do not read the questions word-for-word; rather, modify the questions and materials to reflect your own personality. The interview and scripting are just a guide. You will modify the wording based on your clients, the program in which they enrolled, and the goals of the coaching program.

Introduction

I am excited about the prospect of [restate any goals your client mentioned in your initial conversations]. I look forward to understanding your situation, learning more about your financial goals, and how I can best help you reach those goals.

Today's Goal

The main goal of our conversation is for me to learn more about you: where you are now and where you want to be (financially). This meeting will help me gather the information I need to build your personal financial plan and help you toward financial wellness.

I'll be asking a lot of personal questions about your finances. As you saw from the initial documents, all your information is held in confidence. Just answer as honestly as possible. Your honest answers will help me figure out how best to help you.

Personal Story

Since we'll be digging into your personal finances, I like to start these meetings by sharing my own story – so you can know where I'm coming from and why I'm here:

[Relate personal story with which you feel clients can relate. Make sure it's true and share important details – how you felt, your goals, and any other details that will help your client feel your sincerity.]

Confidentiality

Before I ask you any questions, I want to reassure you that everything we discuss is confidential. I follow strict compliance guidelines and I am 100% committed to protecting your information. Anything we talk about is just between us.

Current Situation Assessment

Let's start by helping me understand your current financial situation, any challenges you may be facing, and your financial goals. Over the next [##_minutes], we're going to dive into your [what you will discuss on this call]. The information you provide today will help me understand your needs so I can serve you best.

Now, you may not have all the answers at the tip of your fingers, and that's OK. We'll get as much as we can together today, then make a checklist of any open items to address after our meeting.

This initial interview gives us a broad idea of the areas where you need support. As we get more accurate and detailed information, we'll focus on your top priorities based on your financial health status.