National Life Group®

Client Follow-Up Script

Agent:

"Hello, this is ________. I'm calling to follow-up on the e-mail I sent to you about scheduling time to review your 403(b) retirement plan. Did you get my e-mail?"

Client:

"Yes or No."

Agent:

"Well, that email included a great statistic from the Employee Benefits Research Institute explaining that people who have a retirement plan are twice as likely to be confident they will have enough money for a comfortable retirement, and I want to make sure that everyone I work with is confident they will have a comfortable retirement! It's been a while since we got together to discuss your retirement plan and I want to schedule a time when we can do that. Is there a day and time this week that will work for you?"

People who have a retirement plan are

2x

more likely to be confident about having enough money for retirement.*

*2020 Employee Benefits Retirement Institute (EBRI), Retirement Confidence Survey.

For Agent Use Only – Not For Use With The Public

TC121221(0521)3

Cat No 102340(0621)