



NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS – FLORIDA

NAIFA Membership Sample Phone Script

Thank you, For Being a Member

INTRODUCTION: Hi, (Mr./Ms.) (Last Name), this is (Your full Name). I'm calling from NAIFA Florida. I am a member of (NAIFA-Local) and I wanted to call you and thank you for your membership and support. (Smile!) How long have you been a member? Wow, that's great, we truly appreciate your dedication to NAIFA, sounds like you understand the difference NAIFA makes and support it offers its members. How is your practice doing this year? (Let them talk) Glad to hear that/or/sorry, it will get better.

If you know this member thank them for attending the local meeting or tell them you have missed them as appropriate. If you don't know them, ask if they go to the meetings/do they like them/what could be better. If they don't attend meetings, why not? Take notes.

(Their first name) I want to make sure we have all your contact info, what is your cell number, we use text now to send important updates. And your personal email, office emails often change. And what is your birthdate? Why do I want your Birthday, you never know I might just call and sing to you!

Well, (First Name), it has been great chatting with you, before I let you go, would you open the contacts in your phone and give us the name and a number of someone you would like to have as a member of your local. Maybe it's an agent in your office, an attorney that you have done work with or a CPA, perhaps your paramed? If you give us their name, we will do all the heavy lifting today and call them and invite them to become a member of NAIFA. We'll tell them you think they are great and want them as part of the team.

Thank you so much for your time /and the referral, we look forward to seeing you at the next NAIFA event. Have a wonderful day!