Premium Lead Solutions
EXCLUSIVE LEADS PROVIDER

Retirement Planning Lead Sample

Introduction (For All Scenarios)
Hi [Prospect’s Name], my name is [Your Name] from **Premium Lead Solutions**. How are you today?

[Pause for response.]

I’m calling because we specialize in helping individuals plan for retirement with strategies designed to maximize income, protect assets, and ensure long-term financial stability.

I’d love to ask you a few quick questions to better understand your retirement goals.

Qualification Questions

1. Full Name:
   Could you please confirm your full name?
2. Age:
   How old are you currently?
3. Retirement Status:
   Are you currently retired, planning to retire soon, or still working?
4. Retirement Savings:
   Do you currently have retirement savings in place, such as a 401(k), IRA, or pension plan?
5. Retirement Goals:
   What are your top priorities for retirement planning? (e.g., income security, reducing taxes, wealth transfer, healthcare planning)
6. Timeline:
   When are you planning to retire or when would you like to start preparing for retirement?

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1. Callback Lead Handling (Retirement Planning)

Step 1: Confirm Interest
Would you be interested in scheduling a callback to discuss your retirement planning options in more detail?

Step 2: Schedule a Callback
When would be a convenient time for our retirement planning specialist to call you back?

- Morning
- Afternoon
- Evening

Step 3: Verify Details
Let me confirm your details to ensure the callback is scheduled properly:

- Full Name
- Age
- Retirement Status
- Retirement Savings (if applicable)
- Retirement Goals
- Timeline

Step 4: Close the Conversation
Great! You’ll receive a call from our specialist [Agent Name] at [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling (Retirement Planning)

Step 1: Offer an In-Person Appointment
If you’d prefer, we can arrange an in-person meeting with one of our retirement planning specialists to go over your retirement options. Would you be open to meeting with us?

Step 2: Schedule the Appointment
What day and time would work best for an in-person appointment?

- Option 1: [Date/Time]
- Option 2: [Date/Time]

Step 3: Verify Details
Let’s confirm your details to ensure everything is set for the appointment:

- Full Name
- Age
- Retirement Status
- Retirement Savings (if applicable)

- Retirement Goals
- Timeline

Step 4: Confirm the Appointment
You’re all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.

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3. Live Transfer Handling (Retirement Planning)

Step 1: Live Transfer Introduction
I can transfer you to one of our retirement planning specialists right now, who can go over your options and answer any questions you may have. Do you have a few minutes to speak with them?

Step 2: Verify Details
Before I transfer you, let’s quickly confirm your information:

- Full Name
- Age
- Retirement Status
- Retirement Savings (if applicable)
- Retirement Goals
- Timeline

Step 3: Initiate the Transfer
Great! I’ll transfer you now to [Agent Name], who will go over your retirement options with you.

Step 4: Close the Transfer
Thank you for your time, [Prospect Name]. You’ll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested:**
  "I understand. Many people initially feel the same way, but once they see how proper planning can protect their income and reduce financial stress, they often find it very helpful. Would you like to at least explore your options?"
- **Already Have a Plan:**
  "That’s great! Many of our clients already had some type of retirement plan, but found that our strategies gave them more control, reduced taxes, or improved income security. Would you be open to reviewing your current plan to see if we can improve it?"

- **Not Retiring Soon:**
  "That’s perfectly fine. In fact, the earlier you start planning, the better the outcome tends to be. Would you like to learn about strategies that can benefit you even if retirement is years away?"
- **How Did You Get My Information?:**
  "We typically receive information through online inquiries or retirement planning resources where individuals express interest in learning more about retirement options."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Age
3. Retirement Status
4. Retirement Savings (if applicable)
5. Retirement Goals
6. Timeline
7. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement:
Thank you again for your time, [Prospect Name]. At **Premium Lead Solutions**, our mission is to help individuals like you achieve financial independence and peace of mind in retirement. You’ll be hearing from us soon. Have a great day!