



OBJECTION KILLERS

SHORT. SWEET. DEADLY EFFECTIVE.

OBJECTION 1: JUST SEND ME THE INFO

REFLECT: "Absolutely – take your time with it"

REFRAME: "Most folks read it and still want a sanity check...or they set it aside and time gets away"

BOOK: "Let me hold 15 minutes so you've got a pro on deck: Thursday 9:10 or Friday 1:40?"

OBJECTION 2: I'LL READ IT AND CALL IF I NEED YOU

REFLECT: "Totally fair – people ask that a lot"

REFRAME: "The problem is the guide can't apply itself to you"

BOOK: "Let's hold 15 minutes so you actually know what matters: Tuesday 10:40 or Wednesday 2:20?"

OBJECTION 3: I'M JUST CURIOUS

REFLECT: "Curiosity is usually where the best results start"

REFRAME: "It tells me something is changing – timing, taxes, or income"

BOOK: "Let's separate noise from need-to-act in 15 minutes, Monday 11:20 or Tuesday 3:10?"

OBJECTION 4: WE ALREADY HAVE AN ADVISOR

REFLECT: "Perfect! Smart people usually do"

REFRAME: "We're often the second set of eyes on the tax/Social Security/Estate planning side"

BOOK: "Let's run your scenario and we'll send a one-pager back to you - Wednesday 9:50 or Thursday 1:10?"

OBJECTION 5: I'M NOT READY YET

REFLECT: "Totally get it"

REFRAME: "That's actually when these calls help the most – before anything is urgent"

BOOK: "Let's do a quick prep call so you know your options: Tuesday 2:20 or Thursday 10:40?"

OBJECTION 6: WHAT'S THIS GOING TO COST?

REFLECT: "Good question"

REFRAME: "Nothing! The Fit Call is just to see if we're the right fit"

BOOK: "Let's use 15-minutes to get clarity: Friday 9:30 or Monday 12:20?"

OBJECTION 7: IS THIS A SALES PITCH?

REFLECT: "Fair question"

REFRAME: "No – this is a planning check, not a product talk. You ask questions, we show answers, and you decide"

BOOK: "Would you like the 10:20 or 11:40 slot?"



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OBJECTION 8: I'M TOO BUSY

REFLECT: "Totally understood"

REFRAME: "That's why we keep it 15 minutes – just enough to see if a deeper meeting is worthwhile"

BOOK: "I'll grab a micro-slot: Thursday 9:50 or Friday 12:10?"

OBJECTION 9: I DON'T GIVE INFORMATION OVER THE PHONE

REFLECT: "I completely respect that"

REFRAME: "The Fit Call isn't numbers-heavy – just context so we know if we can help"

BOOK: "Let's talk high-level for 15 minutes: Tuesday 3:20 or Wednesday 1:10?"

OBJECTION 10: WE'RE ALL SET

REFLECT: "Great – Sounds like things are going well"

REFRAME: "What most people want is a quick confirmation that they aren't missing something"

BOOK: "Want me to hold Thursday 9:10 or Friday 1:40 for a quick check?"

OBJECTION 11: I DON'T WANT TO MAKE AN APPT YET

REFLECT: "That's totally fine!"

REFRAME: "That's exactly why the Fit Call exists – it's not commitment, just clarity"

BOOK: "Let's grab 15 minutes: Monday 11:20 or Tuesday 3:10?"

OBJECTION 12: THEY'RE UNAVAILABLE / DON'T NEED THAT

REFLECT: "I completely understand"

REFRAME: "They requested the [topic] guide personally, so I just want to confirm we sent what was promised"

BOOK: "Can I leave two quick times for them? Tuesday 10:40 or Wednesday 2:20"

OBJECTION 13: IS THIS ABOUT MOVING MY ACCOUNTS?

REFLECT: "Good question"

REFRAME: "This is about planning – not paperwork. If we can't help, we'll tell you in the first 15 minutes"

BOOK: "Would you like the 10:40 or 2:20 slot?"

OBJECTION 14: I DON'T MAKE DECISIONS ALONE

REFLECT: "Smart – and common"

REFRAME: "That's why we do Fit Calls with both decision makers whenever possible"

BOOK: "Should I hold Thursday 1:10, or is Friday 9:50 better for both of you?"

OBJECTION 15: LET ME THINK ABOUT IT...

REFLECT: "Of course!"

REFRAME: "Thinking is easier with a little clarity"

BOOK: "Let's use 15 minutes to see what you're deciding about: Tuesday 10:40 or Wednesday 2:20?"