DINNER QUALIFYING SCRIPT

INTRODUCTION (Set the Tone — Calm & Professional)

"Hi [First Name], this is [Your Name] calling from [Firm Name]. I just wanted to reach out personally to confirm your reservation for our upcoming dinner event on [date] at [venue]. Do you have a quick minute?"

(If yes, continue. If not, schedule a callback — reinforces boutique service.)

STEP 1: CONFIRM DETAILS & SET EXPECTATION

"Perfect — we have you down for [# of seats] on [day/time]. The evening is going to be a relaxed, conversational dinner where our [Title and Name of Presenter], will be sharing insights around how families like yours can navigate wealth decisions as they near retirement."

"We'll start with a short educational discussion, and then you'll enjoy dinner and conversation with our team and other guests. Most people say they appreciate how different this feels from a typical financial event — very calm, thoughtful, and interactive."

STEP 2: TRANSITION TO QUALIFICATION (Conversational, Not Interrogation)

"To make sure the evening is valuable for you, I'd love to get a quick sense of what stage you're in financially — that way we can make sure we seat you with the right group and address topics that matter most."

Ask 2–3 Core Questions:

1. "Would you say you're more in the stage of building wealth, approaching retirement, or already retired and focused on legacy planning?"
   (Listen and mirror back: "Got it, so you're in that transition window — that's a big focus for us.")
2. "Do you currently work with a financial advisor, or are you just exploring what else is out there?"
   (Tone tip: Say this gently — as if you're trying to understand, not replace someone.)
3. "When you think about your wealth right now — what's the area that weighs on you most? Taxes, market risk, or making sure your family is set up long-term?"
   (This helps you tag them as "tax-motivated," "risk-sensitive," or "legacy-oriented.")

STEP 3: REINFORCE BRAND & DIFFERENTIATION

"That's really helpful. One of the reasons people appreciate [Firm Name] is that we take a long-term view. We're not focused only on retirement, but on how your decisions today shape the next 10, 20, or even 30 years — for you, your family, and your legacy."

"At the dinner, [Advisor] will walk through how that philosophy guides everything we do."

STEP 4: CONFIRM GUESTS & CLOSE CALMLY

"Before we wrap up, will anyone be joining you that evening?"

(If yes, ask name/relationship — use it later to personalize greeting at check-in.)

"Wonderful. We'll send you a quick confirmation email with all the details, including directions and dress code — it's a relaxed evening, business casual is perfect."

"We're looking forward to meeting you and sharing some perspective that most families don't usually hear at these kinds of events."

(Close warmly)

"Thanks again, [Name]. We're really looking forward to hosting you at [Firm Name] dinner on [day]. Have a wonderful day."

OPTIONAL QUALIFYING ADD-ONS (If appropriate during conversation)

If they open up about assets or stage of life:

"It sounds like you've done a great job building your wealth — are you mostly looking to fine-tune your strategy or make sure it's aligned for the next generation?"

If they sound disengaged or "just curious":

"Totally understand — a lot of people come just to get a clearer sense of what's possible. Our goal is that you leave with at least one new insight about your long-term planning."

NOTES FOR THE CALLER / INTERNAL GUIDANCE

Area	**What to Listen For**	**How to Tag in CRM**
Life Stage	Building / Transition / Retired	e.g., "Pre-Retiree"
Motivation	Taxes / Market / Legacy	Primary topic interest
Current Advisor	Yes / No / Unsure	"Advisor relationship" field
Guest	Yes / No	Add +1 name

OPTIONAL FOLLOW-UP EMAIL TEMPLATE (Sent After Call)

Subject: Your Reservation is Confirmed — [Firm Name] Group Dinner on [Date]

Body:

Hi [First Name],

It was a pleasure speaking with you. We're looking forward to hosting you for our upcoming dinner at [venue] on [date/time].

The evening will be an opportunity to enjoy a great meal and meaningful conversation as we explore how to align your wealth, family, and legacy for the years ahead.

We'll have a brief educational discussion followed by dinner and open conversation with our team. Dress is business casual.

See you soon,