

MARKET VOLATILITY SCRIPT

They clicked:

- Market crash
- Retirement risk
- Volatility
- Sequence of returns
- Bear market content
- Risk analysis quiz

DELIVER

Hi [Name], this is [Advisor] with [Firm].

You recently requested our market volatility guide, and I just wanted to make sure it came through okay.

PIVOT

When you clicked on the market risk guide, what was really on your mind? (Pause)

REFLECT OPTIONS

"I'm worried about another crash."

Totally understandable. Most people near retirement are less worried about averages and more worried about timing.

"I cannot afford another big loss."

Right. Because retirement changes the math. Recovering from losses while taking withdrawals is a very different challenge.

"I do not know how much risk I'm actually taking."

That is more common than people think. Most investors know what they own, but not what it could do during a real downturn.

BRIDGE

That is exactly why we run retirement risk analysis.

We help people understand:

- Sequence risk
- Withdrawal risk
- Portfolio stress testing
- and whether their current allocation actually matches retirement reality.

BOOK

Let's do a quick 15 minute Fit Call and see whether your current plan is aligned with the type of retirement you actually want. Would Thursday at 1:10 or Friday at 9:50 work better?