**Terms of all sort of marketing and markets:**  
*forex*- fx or foreign exchange(the exchange)(marketing for trading currency)  
*stock-*share in the ownership of a company(individual stock in a company)  
*cryptocurrency*-digital currency used as an alternative payment method or as an investment, securely without the need for a central authority(digital decentralized currencies)  
*commodities*-raw materials used to create the products consumers buy  
*bond*-security depts  
**objectives of the sale**  
*Intro*-introduce, reason of the call representing the company(who you are, with whom I’m speaking, are you calling from)  
*KYC*-know your client(ask some questions)  
*EXP* do you have any experience in this field,  
*AGE*-to make sure we are able to work with you may I ask how old are you,  
*COUNTRY*-where you originally from,  
*Offer*-what does the company offer   
*Closing*-methods we offer to our clients to start working with our company  
**country that are banned(blacklist)  
USA,ISRAE,LFRANCE,UKRAINE,MOLDOVA,GERMANY(because-US citizens are not allowed to trade outside of U.S.A. ,conflicts inside country, law regulations)  
Forms of paraverbal  
whisper effect**-talking to a person in a way that feels like you are exposing a secret to prospect  
**silence technique**-giving time to the prospect, letting the prospect think on the words you said before applying the silence technique  
**tone of voice applying** tone to specific words, underlying some words ,makes the client paying attention to what you want  
**active listening** not only listening to the words but also to the tone of voice and the meaning behind them  
**The following techniques must be avoid   
it is forbidden to make any promises under any shape or form  
it is forbidden to use profanity against other clients  
consent words or phrases should be avoided as much as possible(can I, can you, may I, please, sir, madame, etc.)  
do not assume anything…  
sensitive words must be avoided likewise(gambling, fraud, scam, lose money)  
find a topic related to the client then link the topic to Kyc then link the answer of that question to the topic**

Kyc question:  
job income(what is your field of occupation, what is average income),  
mortgage rent(do you have a mortgage or you’re renting something, or maybe you have own place)  
loans debts(I believe you’re free from personal loans or debts)  
goals(do you have any particular goals by this investment)  
family(happy single or married)  
savings(I believe working for x amount of years in y field you’ve saved up something for yourself)  
bullish market-(optimism) markets rising 20%rise after two 20%falls,economy expanding average length  
bearish market  
after bearish market the bullish market coming(after crashing the market will come to normal)  
LEVERAGE AND MARGIN  
trading in leverage is risky(the outcome need to be more than the interest)  
it is when one uses borrowed funds(dept)for funding the acquisition assets in the hopes that the income of the new assets or capital gain would surpass the cost of both=growing is known as financial leverage   
  
CONTRACT FOR DIFFERENCE(CFD)  
*What is cfd*-is a contract to difference. Working with this instrument, the trader not actually own the asset to which he is tied  
*No need to own*-since you are not the holder of these assets, no need to buy the asset in full price, traders are able to buy just a small percentage of the asset   
*Trade any asset*-cfd can be linked to any type of assets such as stocks, commodities, bonds, cryptocurrencies, etc.  
*Make profit both way*-traders working with cfds can make money on both bullish and bearish market with high leverage  
**What is nfp**Nfp or non-farm payroll is a measurement of the change in the number of employees, excluding farm, government, private household and non-profit organizations employees in the USA during previous month.  
nfp was called the second salary of trader  
considered as a key indicator of the strength of the us labor market and is released by the bureau of labor statistics on the first Friday of each month, it becomes very important for each traders  
basically is a rate of unemployment  
**Fundamental analysis** is based on news and nfp and public speeches  
**Technical analysis** based on analyzing prices primarily used for short- to medium-term trading, while **fundamental** analysis is often used for long-term investing  
  
**Making money w/ Non-Farm Payroll(NFP)  
rate of employment**-if job growth is really strong it’s a good sign to invest in the stocks market, however if it’s otherwise, it’s a good sign to sell **rate of unemployment**-if the unemployment rate is low the us dollar strength is growing however if the unemployment rate is high the us dollar’s strength is weakening **average workweek**-if average workweek is growing stocks investments are also growing, if average workweek is lowering stock investments are also weaking  
  
AGE 60-65+  
**CPP**-CANADIAN PENSION PLAN **RRSP**-REGISTERED RETIREMENT SAVINGS PLAN **TFSA**-TAX FREE SAVINGS ACCAUNT **OAS**-OLD AGE SECURITYAGE 70+  
IF HIS AN IMMIGRANT HE WANT TO HAVE ENOUGH MONEY TO BRING ALL HIS FAMILY IN CANADA  
People from Nigeria will do everything for their family  
People from India are very cheap  
If you’re a truck driver you want your own truck  
its need to find out the main job in industry  
**firefighter, police, medicine and teachers-I’d like to express my gratitude to your service/thanks for your service/thank you for contributing to our future**  
**AI in trading, how it can be used**  
Auto trading-is being offered to our clients, auto trade can be either with the software we provide or also with tools or instruments that work automatically by themselves(once being programmed).Advertisement is also sponsoring the software first as of making.  
why financial expert is better?-auto trading is good at one thing, respecting the algorithms. In order for investment account to work, **THE CLIENT MUST SPECK TO A FINANCIAL EXPERT.** Financial expert is the one setting it up. Based not only on technical analysis.  
if you are asking if you have a software. Yes, we do. But the financial expert is basically like a software operator, you the client cannot manage it on your own, ice you don’t have the necessary  
skills/knowledge/experience, this is exactly why you will be assigned with a financial expert so you won’t have to do any of the hard work.  
a major fact that affects the financial market are the news or so-called fundamental analysis. Financial market can and will get affected by all kind of news. From day-to-day news, the speeches, public opinion, wars. The economic calendar is a good way to track all of it.  
another major fact that is affecting the financial market are the patterns or so-called technical analysis  
trading signals-are triggers to buy or sell a security based on a pre-determinate set of criteria. They can also be used to reconstitute a portfolio and shift sector allocations or take new positions.  
risk management tools(take profit, entry price, stop loss)(those tools are like a safety pillow that helps you to not lose your money)  
diversification(it’ll be better to invest in every segment, with that you’ll never lose money)  
  
  
**how I can be sure that I will not lose my money**  
that’s why I’m here to provide you with information and help  
Traders are more invested in the process of buying and selling securities, so it's important that they're skilled in evaluating the market. Brokers, however, are facilitators of communication between clients and security holders, so it's important that they're charismatic and skilled in collaboration. bank will promise a very small return funds (usually 1 to 2) (low risk low profit)  
  
**FINANCIAL STRATEGY**-financial strategy can be offered first as the best-selling point.it is the same as painting an image. Ex: buying a house, buying a car, family goal, financial freedom, early retirement, paying any loan/mortgage, having a big amount as a savings account.  
**COMMINISSION**-is taken from the profits of our clients only.it starts from 1% and it depends on which asset you invest! The commission can reach up to 10%Commission can also be offered as a selling point. As we depend on our clients profit to make our own profit.  
**TRADING SIGNALS**-triggers for action, either to buy or sell a security or other asset, generated by analysis. Can be human generated using a technical indicators, or it can be generated using mathematical algorithms based on market action.  
**FINANCIAL ANALYTICS**-is offered by your financial advisers based on fundamental and technical analysis. financial market analytics are a way to predict the profits and avoiding losses. Can be used as a safety measurement  
**PLATFORM**-user friendly platform comes with a variety of highly advanced charting tools and technical indicators that can help you analyze markets more effectively  
**PERSONAL PORTFOLIO**-financial portfolio is a collection of investments such as stocks, bonds, commodities, etc. Based on risk tolerance, investment’s objective. Being fully managed and diversified by our company.  
**RISK MANAGEMENT**-a number of risk management measures are being taken. First of all, it comes to the financial expert. Doing all the fundamental and technical analysis, predicting the financial market. The investment account by itself has stop loss and take profit, which plays roll as a pillow for ,, worst case scenario’’  
**FINANCIAL EXPERT**-a financial expert which has more than 10 years of experience if offered to build the best strategy possible for each individual client. numbers, percentages, assets and profits are acknowledged in every trade that the client opens.  
  
  
**WHAT CAN WE OFFER AS A COMPANY**  
let me ask you some questions that will beneficiate each other  
we will provide you with a financial expert  
if you don’t mind, I would like to explain to you a bit about company and what we are doing in general-the basics are very simple. We are an investments institution, helping prospects with investments or gain additional experience. Apart from providing you with personal FA/FE and web trader we also creating strategy for your investment, which depends on your goals, personal preferences, financial situations and so on. Based on our experience most people are in need of help with paying mortgage. We also provide help to business owners or potential homeowners, as well as retirement plans, so do you have any particular goal that you would like to achieve from this investment?   
Let me explain how this is going to work for both of us. From our side we are providing you with a software and financial expert that would build the best strategy possible for each individual client who’s analyzing the market by fundamental and technical analysis, who’s providing you with trading signals and creating  
  
**make client to understand on what he will spend money**  
  
experience in that field  
age  
country originally  
compliment  
offer for and about documents  
thanks   
about the company  
what do you want to achieve by this investment  
job income   
rent  
loans/depts  
goals   
family  
savings  
  
what’s the first thing you’ll spent money on  
what you will be if you’ll find a 1k dollars on the street  
what did want to be when you was a kid  
I want to know you better so tell me about….  
  
if you have any concerns or any doubts you can ask me, so tell me what bothers you  
I do not requesting you to trust me, I’m asking you to trust the process  
first of all we are a registrated company,9 years global market Canada 4,upon deposit you’ll receive a deposit declaration  
not a problem you can put me on loud specker  
trust the reviews it’s not a best option  
black advertisement  
I completely understand, your time is very valuable for both of us. Since you’ve already taken the step to sign up on our website, allow me to assure you that our pre-service is designed to save you time and streamline your income increasing. I can demonstrate how our solution can benefit you and actually save you time in the long run.  
  
I understand your time is limited, so let’s make the most of the time we have together. Our solution can actually save you time in the long run, and im confident it will be worth your while to hear more. Well focus on discussing the key benefits and features that align with your needs right now.  
**I WANT TO VIEW THE REVIEWS**  
its great you’re interested in hearing from other costumers before making a decision. We have a strong track record of satisfied clients, and I’m confident you’ll find their feedback valuable. While you’re reading through the reviews, I can provide you with additional information about our product/service can specifically address your needs and make a positive impact on your specific goal, btw what is it  
**I WANT TO SPEAK WITH MY WIFE**while its valuable to have your spouse’s input, making a deposit now allows you to start benefiting from our product/service right away  
you can always involve your spouse in the decision making process later, but taking action now ensures you don’t miss out on the advantages our solution offers.  
**IM NOT INTERESTED**  
if there’s anything specific holding you back from making a deposit, I’d be happy to address it, we’re here to provide support and ensure you’re fully confident in your decision. You have to share any concerns you may have, so we can discuss them further  
**HOW MUCH TIME I WILL SPEND ON THAT**it’s going to take 5-10 minutes, whenever you have free time like in the morning with a cup of coffee or in the evening when you turn on your computer after you came from work and check how things are going   
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
  
EX.  
**HI, am I speaking to x,  
my name is Victor, how are you,  
I’m from Key People and the reason I’m calling you is about your recent registration on our site,  
I was assigned as your personal account manager and I will help you today, (**if you have any questions don’t hesitate to ask, okay?)  
(Good so before we will proceed)**if you don’t mind I will ask you a few questions for me to understand if you fit our company requirements  
first of all do you happen to have any previous experience in the field?**-no- not a problem I’m here to guide you through whole process and of course as a company we are looking forward for long term relations, but from your perspective as a person who doesn’t have experience it doesn’t really makes sense to start with long term investments, at the current moment you have a good opportunity to start with bare minimum and test the water, to figure out for yourself if that’s going to be suitable for you and if you will be satisfied with our service. How does it sound?  
for our   
 **-yes-what kind of experience do you have it was positive or negative?  
were you trying to trade by yourself or with someone’s help  
Btw you sound pretty young/solid, how old are you  
This is an offer only for Canadian citizens and residents so I believe you’re originally from Canada?-yes-beautiful, so as a proof of your identity do you have driver license? And I believe that you don’t have any document related to USA-no-**if no-where are you from, do you have Province IDEx. India-I’ve heard it’s an amazing country I would like to visit it someday, is there any places that you recommend to visit **for how long you’ve been staying in Canada(Was there something particular that brought to Canada, maybe family or work, do you like it here?- I believe that you have your passport as a proof of identity?  
To ensure I’m providing you with the best service and meeting your needs in expand your finances, I just have a few quick questions. Your input is really valuable to me, and I appreciate your time in helping me understand situation better, also to make sure we are going to be profitable for each other we will take care of your personal portfolio which is a list of assets by creating and diversifying it into different aspects of financial market. For us to be able to create suitable one for you and to be certain this is going to fit your day-to-day schedule, what are you doing for living  
you said you’ve been working as a … for how many years? Did you manage to save up something for yourself? An average for example how much do you make a month**How much money I can make  
7 to 12 % of profit  
how much do I need to pay   
you do not need to pay anything for our services, we are working on commission so the money you initially filling your balance with will be invested  
  
  
I wanted to take a moment to share an exciting opportunity that could significantly impact your financial future. You can unlock Your Financial Potential with us. The markets are full of potential, and with the right strategy, discipline, and risk management you can take advantage of profitable opportunities. Our FE are specialized in identifying high-potential trades and helping clients navigate the complexities of the market. Here’s how he can help you  
Strategic Trade Planning-Maximizing returns while managing risk effectively  
Markets Insights -Real-time analysis to keep you ahead of trends  
Personalized guidance-A tailored approach to fit your financial goals   
Consistent Growth -Focuses on long term profitability, not just short term wins  
Now is the perfect time to start or refine your trading journey lets work together to turn market opportunities into real gains. Are you ready to take next step?