



Complete Presentation Script

Overview

This is the complete script for your team to reference during client meetings. The script is organized into natural chunks that flow from introduction to action steps.

1. The Opener

"Hey, thanks for meeting up. I really appreciate you taking the time.

Before we get into anything, I just want to be clear — this isn't a sales meeting.

The reason I wanted to connect is pretty simple. I'm in the process of opening a new office here in Toronto, and part of that means getting to know people and understanding the community.

So today, I'll share a bit about what I do. And if along the way someone comes to mind who you think I should meet, or someone you think could use help, that's really all I'm looking for.

Does that sound fair?"

2. Getting To Know You

"So, before we dive in... I'd love to understand a bit more about your situation. Let me ask you a few questions to get to know you better."

Questions to ask:

- What do you do for work?
- That's interesting. What do you like most about your current career?
- If you had a magic wand and could change anything about it, what would you change?

- Are you making all that you want to make right now? If there's a gap, how much more would you like to be earning?
 - Do you have any kids? How old are they if you don't mind me asking?
 - If time and money were no issue at all... what would you and your family do differently? What would that freedom look like for you guys?
 - When do you see your current career allowing you to accomplish those kinds of things?
 - Do you have someone right now who handles your current financial needs other than yourselves?
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3. Setting Expectations

"Thanks for sharing that. I know you're busy, so I'll keep this simple.

Usually, one of three things happens in conversations like this.

First — I explain what I do, and along the way, you might think of someone who could really use the help. If that happens, I'd appreciate an introduction.

Second — I'm in the process of building a team. So if someone comes to mind who you think would be a good fit to work with us, I'd love the opportunity to connect with them.

Or third — you might already be in good shape financially. But if there's one area that catches your attention, and you'd like me to take a closer look, we can do that too.

No pressure either way. You decide. Is that okay?"

4. The Financial House Concept

"One thing I notice with most people is that their money is kind of spread out everywhere. Different banks. Different accounts. Different advice.

So what I do is pretty simple. I help people organize everything into one clear structure that's easy to understand and follow.

The easiest way to picture it is like a house. I call it a financial house.

Just like a real house, every part has a purpose. And some parts matter more than others.

You'd agree the foundation is the most important part, right?

In your finances, that foundation is protecting income. Because if income disappears, everything else stops mattering. In that moment, people aren't thinking about retirement or long-term plans. They're thinking, "How do we pay the mortgage?"

That's why income protection is the foundation of the house.

The next level is the basics:

- Emergency fund
- Simple budget
- Will and power of attorney

These are the things that keep everything stable when life throws a surprise.

After that, we focus on:

- Getting rid of debt
- Planning for retirement and kids' education

And at the very top, the roof of the house, are your goals and dreams:

- Trips
- Freedom
- Time

Because there really has to be more to life than just paying bills."

5. Common Problems With The Financial House

"At this point, most people are thinking, 'Isn't this what everyone does?' And on the surface, it looks that way.

But once you zoom out, there are a few common problems we see over and over again.

Insurance Gaps: A family might have life insurance, they're paying for it every month, but if you actually look at the coverage, it's often not enough to replace income or even pay off the mortgage. So technically, they're insured. But practically, they're still exposed.

Emergency Planning: When it comes to emergency savings and budgeting, most families are left to figure that out on their own. And because no one walks them through it, it usually gets pushed to the side. Then something unexpected happens and the money comes from a credit card or line of credit. Not because people are careless — but because there was never a plan.

Missing Legal Documents: It's similar with wills. Most people agree they're important. But because they feel expensive or complicated, they get delayed.

Debt Without End Date: Most families don't actually know the exact date they'll be debt-free. They assume it's when the mortgage ends, and forget about everything else. And instead of helping people eliminate debt, most advice focuses on managing it.

Investment Confusion: On the investment side, people are usually doing the right things. They're saving, they have accounts set up. But if you ask simple questions like, 'What do you actually own?' or 'How has this performed over time?' Most people aren't sure.

Missed Opportunities: With kids' education, we see the same pattern. Money is being saved, but many families miss out on grants or incentives simply because no one explained them.

No Coordination: And when everything else feels overwhelming, the roof of the house — the goals and dreams — gets pushed aside.

The Two Biggest Issues:

1. **Everything is spread across multiple companies and multiple advisors.** Each one focuses on their piece, but no one is coordinating the whole picture. It's hard to move forward when the left hand doesn't know what the right hand is doing.
 2. **There's no written plan.** Quick question: In all the years you've worked with financial institutions, how many times has someone sat down with you and given you a clear, written plan for everything?"
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6. How We Get Paid & What We Do

"Exactly. So here's what my team and I actually do when someone comes to us. We put a real plan together.

Most of the time, we're able to:

- Lower insurance costs
- Get wills and power of attorney in place
- Help people get out of debt faster
- Improve investment performance over time

And whatever money we free up, we redirect it toward things people actually care about — like trips, time off, or long-term goals.

If I was able to do that for someone you care about, would they be upset?

That's basically what we do. We look at everything together, from a big-picture point of view, and build a custom plan. The tools we use come from our head office, and there's no cost to the client for the planning itself.

So if you happen to run into someone who could use this kind of help, I'd really appreciate an introduction.

Does anyone come to mind?

Thanks — I appreciate that. What's the easiest way for me to connect with them? Would an intro text or email feel best?

For Those Interested in Working With Us:

And just to mention it — some people also get curious about working with us. We're always looking for people who like helping others, enjoy learning, and want more flexibility.

If that ever comes up, here's how it works:

We're paid based on volume. So the more people you help, the more you earn. On average, helping a family across a few areas can generate somewhere between 600 and 1,000. Sometimes more, sometimes less — it depends on the situation.

Most people are surprised by how little time it actually takes. Helping a client from start to finish is usually 4-6 hours, and it can all be done online.

There are no quotas, and people choose their own schedule.

That's why, if you ever think of someone who's motivated, good with people, or likes teaching and learning, I'd be happy to introduce them to my manager for a quick conversation.

Does anyone like that come to mind?"

7. The Sort (Closing)

"Out of everything we just talked about, what stood out to you the most right now?

Would you say it's looking at your own finances more closely?

Or are you more interested in the income or business side of things?

Or is it more that you're thinking about people you know who could use this kind of help?"

Key Delivery Notes for Team Members

- **Pace:** Speak naturally, not rushed. This should feel like a conversation, not a presentation.
- **Tone:** Warm, curious, and helpful. You're sharing valuable information, not selling.
- **Listening:** Pay attention to responses and adjust accordingly. This is a dialogue, not a monologue.
- **Transitions:** Use the natural pauses built into the script to let concepts sink in.
- **Flexibility:** Be ready to spend more time on areas that resonate most with each individual.
- **Authenticity:** Use your own words while maintaining the core structure and message.

Remember: The goal is to build relationships and identify opportunities to help, whether through client referrals or team recruitment.