***→INTRO***

Hello, (name of the client)? (waiting for a response)

My name is . I'm calling you with (name of the company). How are you doing today?

I see that you just have applied for an investment venture with us, am I right?

Nice to hear that! The reason for my call as your account manager is to explain more about our services and to help you to accumulate profit from the first day! First of all, tell me what actually caught your eyes on our commercial? Was everything clear for you or do you have some questions?

# →EXPERIENCE

*(Solve his bad experience or the reason why he is not investing)*

## In this case let me ask you what kind of investment experience do you have?

* If NO EXP - Investing is very profitable and popular nowadays, why have you never tried it? (find a problem and solve it)
* If HAS EXP - "Tell me more about it" - solve his experience

Well, that's not a problem because actually about 78% of our clients are also beginners with no experience just like you. That's why we work with each client individually by providing a **PORTFOLIO MANAGER** who will be able to guide you and help you with each step whenever you need any help.

# → Presentation with KYC

So let me explain to you how it works here. You have applied for a Canadian project (name of the project) to get benefits from the financial market. In order to comply with the regulation let me ask you a question: **Are you a citizen of Canada?** Great!

From our side we will provide you with a comfortable trading platform which is really easy to use. To the platform we will connect the trading software which will do all of the analyses on your behalf and will send signals to you or to **your PORTFOLIO MANAGER** so you will be able to get your profit without dedicating a lot of time on that. We made sure that our services will suit even a full day busy person. **By the way, what do you do for a living?** (*give feedback about the job*). The main beauty of the trading software is that it works 24 hours a day so you are fully protected from market movements even when you are not really into it. **And do you have any specific goals that you would like to achieve with our company?** Okay so in addition to the trading software we are providing our clients with a **PROFESSIONAL BROKER** who has more than 12 years of experience in trading and creating portfolios for clients. He will create a personalized strategy depending on your goals and financial situation so you will become more confident in your financial future.

**How does it sound to you?** (wait for answer) **If we are talking about your financial situation how would you rate it from 1 to 10?** (feedbacks: 1) That's good that you have a good

financial situation so we will help you to multiply your savings so you will achieve your financial goals faster 2) No worries, here we will help you to trade on financial market so you will be able to create some savings for yourself that will lead you to the financial freedom in the future.

**Okay, so for now do you have any questions?**

# →Closing

Okay, so in this case let me show you the trading account and I will help to personalize it.

* Showing chart, can give a small presentation
* Changing the password so client’s account will be fully secured
* You can show the withdrawal if client is scared AF
* Okay so your account is ready to go, did the commercial mention what is the minimum amount to start?

Also if you want to you will be able to start with one of our calculated deposits, as you said the minimum is 350. The middle package is 690CAD and the largest one is for 1000 CAD.

350 CAD

500 CAD

700 CAD

1000 CAD

Address:

120 ADELAIDE STREET WEST SUITE 2500

TORONTO, ONTARIO M5H 1T1

## Verification:

In order to comply with the state regulation we are required to verify your identity so in order to do that you can use your id or a driver license. This is done to have a full ownership of the account so no one will have any access to that but you.

## AFTER FTD

Congratulations — your account has been successfully activated, and you are now officially part of our company.

I will now introduce you to your personal portfolio manager, who will be directly responsible for guiding you toward consistent results and long-term success.

**During your 5 days test-drive period**, **your portfolio manager will work with you step-by- step**, helping you master every feature of our platform, refine your trading strategy, and unlock your full earning potential with the support of world-class expertise.

**We recommend following their guidance closely**, as you will participate in live trading sessions each week. These sessions are designed to be time-efficient while delivering tangible, impressive results that often exceed expectations.

**In addition, your portfolio manager will occasionally present you with exclusive fundamental deals** — **rare opportunities with the potential to generate more profit in a single trade than an entire month. By combining these two strategies, you can realistically achieve in just one month what most people earn from their bank savings in an entire year.**