**Client Contact**

One or two days after sending the email you should contact your client by phone to arrange a meeting either in person or using join.me, a free video conferencing website.

Remember that your goal is to book a short meeting so that you can complete the steps outlined in the “Meeting” section that follows. Below we have provided a sample phone call script that you can modify to meet your needs.

**Sample Phone Script**:

Hello <\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_>, this is <\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_> from <\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_>.

A few days ago, I sent you an email requesting your assistance. There are number of regulatory changes that have occurred since our last face-to-face meeting and I need your help to ensure that the information I have in your file is up-to-date and accurate.

Can we arrange a time over the next week for a quick meeting? <Suggest a location>

**Location, Office**:

I have an opening next week on <\_\_\_\_\_\_\_\_\_\_> at <\_\_\_\_\_\_\_\_\_\_>, does that work for you?

**Location, Home**:

I could meet in your home next week on <\_\_\_\_\_\_\_\_\_\_> at <\_\_\_\_\_\_\_\_\_\_>, does that work for you?

**Location, Virtual**:

It is not necessary to meet in person. Let me send you a link to a web meeting that you could join using any computer connected to the internet. I have an opening next week on <\_\_\_\_\_\_\_\_\_\_> at <\_\_\_\_\_\_\_\_\_\_>, does that work for you?

**Objection / Question**:

<\_\_\_\_\_\_\_\_\_\_\_\_\_> I understand, but this is very important and I would very much appreciate it if you could make some time to meet with me over the next few weeks. <Suggest a location>