

FINANCIAL PLANNING – “A” Script

[Erica] *I’m Erica Lopez and you are watching “Your Retirement Minute.” Without a sound financial plan, it’s very difficult to achieve a comfortable retirement today. Joining me now is _____, president of _____, a firm in that focuses on preparing people on how to successfully retire.*

_____ has been featured in Kiplinger’s Magazine as “One of America’s Retirement Experts,” and has also been interviewed on CBS, Fox, ABC and NBC regarding various retirement topics.

[Erica] _____, *what’s the biggest misconception people have about financial planning?*

[_____] TBD.

[Erica] *If you can make more money in real-time market investments, why would you need to plan?*

[_____] TBD.

[Erica] *Most people no longer have a pension to draw from in retirement. How can you create a “private pension” in a financial plan?*

[_____] TBD.

[Erica] *All of that being said, you actually have something very special for our viewers who are watching at home:*

[_____] *We do, Erica. For the first five callers who have saved [\$200,000 or more] for retirement, I’d like to invite them to give our team a call and we’ll personally help them create their very own _____ Retirement Plan, and we’ll do this on a complimentary basis.*

[Erica] *This really is an opportunity not to be missed. The number to call right now is (000) 000-0000. Thank you for your time, _____. And, remember, for your free Retirement Plan, that number again is (000) 000-0000. Thank you all for joining us today.*