

# Scripted Meeting Close

## 1 Closing Question

**Option 1** - “Was this meeting helpful today?”

**Option 2** - “Was this meeting what you expected?”

## 2 Share My Perspective

**Option 1** - “I bet you are leaps and bounds ahead of many of your colleagues who haven’t started asking these questions yet – they are likely still where you were when we first met.”

**Option 2** - “I love working with you, and I would love to work with more families like yours!”

**Option 3** - “I would love the opportunity to help any of your colleagues who you feel would benefit from the same kind of help.”



## FIVE KEYS TO SUCCESS

- › Cultivate Willingness
- › Follow Up Quickly
- › Thank the Source (*Starbucks Card + Handwritten Note*)
- › Respect Clients’ Colleagues
- › Track Activity for Six Months

***Practice until it’s second nature.***



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