

Sample Coronavirus Phone Script

Schedule the client for their semi-annual investment account review like normal and then tell them ...

Due to current client concerns and our staff concerns, until this coronavirus situation is under better control, we are going to conduct all client account reviews by phone. I hope that is okay with you as well?

We will send you the exact same packet of information that you would have gotten if you were meeting in our offices, except we will send it to you the day before your scheduled phone conference.

It will be delivered by FedEx overnight. No signature is required, so they will simply leave it on your front porch. It is usually delivered in the afternoon.

Dave or Megan will call you at the scheduled time and go over the information in the packet page by page, just as if you were sitting with them in the office like always.

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