



Suggested Supernova scripts for reassigned clients

Script 1:

FA: At this stage in my career I am focusing my energy on fewer and more complex clients. I have asked _____ to take over responsibilities for your account. I told him you are not only a good client but also a personal friend. And I have asked him to take particularly good care of you. If you have any concerns don't hesitate to call but I am sure he is going to give you the same high level of service as I have.

Script 2:

FA: At this stage of my life I have decided to focus my time and energy on fewer clients with more challenging circumstances. I have asked _____, a friend and associate whom I highly respect and admire to meet with you. I have told him that you are a valued client and friend and that he should treat you like family.

Script 3:

At this stage of my career I am focusing my energy on fewer clients with more complex circumstances. I have asked my partner, John Smith, to work with you. Your loyalty and trust has been very important to me. I have told him that you are not only a client, but a friend and to treat you like family. He will be contacting you shortly.

Question: Is there any way that I can stay with you?

Answer: I am limiting myself to 100 households. The cost associated with the planning work that I will be doing is more than I want you to pay. John will do an excellent job and you can always call me if you have a problem.

Question: What is your minimum?

Answer: I limit myself to 100 households so that I can maintain the highest level of service. Therefore it depends. It is always changing.