



Coaching client when losing FA calls.

1. I appreciate you calling me. It is important that you know this was not a decision I made quickly. I have been in discussions for a couple of months and have asked (My New Advisor) a lot of questions. After a lot of thought I have come to the conclusion that this is the right thing for me now. I am comfortable with my decision. If (My New Advisor) doesn't deliver what I think they will, I will be open to talking to you again.

If the FA is still wanting explanations:

2. I am really not having this discussion right now. I started the transfer process and as I said I am comfortable with my decision.