Prospect Outreach Script Bundle for Financial Professionals

Purpose: These customizable scripts help financial advisors and professionals initiate conversations with potential clients across platforms while staying compliant, warm, and value-focused.

Email Outreach Scripts

1. Cold Email Script – Personal Finance Focus

Subject: Let's Talk About Your Financial Future

Hi [First Name],

I hope this note finds you well. I'm reaching out because I work with professionals like you who want to take a more strategic approach to their finances. Whether you're planning for retirement, optimizing your investments, or just trying to get organized — I can help.

Would you be open to a 15-minute call to see if I might be a good resource?

Warm regards,
[Your Full Name]
[Your Firm Name]
[Phone | Email | Website Link]

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2. Follow-Up Email Script

Subject: Just circling back — any thoughts?

Hi [First Name],

Just wanted to follow up on my previous email. If financial clarity or a second opinion is something you're considering this year, I'd love to offer a quick, complimentary consultation.

Let me know what your calendar looks like this week.

Best,
[Your Name]

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3. Referral Request Email

Subject: Know someone who could use financial guidance?

Hi [First Name],

I really appreciate the trust you've placed in me. If you know anyone — family, friends, or colleagues — who may benefit from a conversation about their financial future, I'd love an introduction. I always aim to provide value, even in just one call.

Thanks again for your continued trust.

Warmly,
[Your Name]

Phone Outreach Scripts

4. Voicemail Script – New Lead

Hi [First Name], this is [Your Name] with [Your Firm]. I wanted to connect briefly about how I help professionals like you simplify their finances and build long-term plans with confidence.
Feel free to call or text me at [Phone Number], or reply to this message with a time that works for you. Looking forward to connecting!

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5. Phone Script – Referred Prospect

Hi [First Name], this is [Your Name]. [Referral Name] mentioned you might be interested in reviewing your financial strategy.
I'd love to learn more about your goals and see how I might help. When would be a good time for a 15-minute chat?

LinkedIn Connection Scripts

6. Initial Connection Message

Hi [First Name], I came across your profile and wanted to connect. I specialize in helping [insert niche, e.g., healthcare professionals or business owners] with smart, personalized financial strategies. Would love to connect here.

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7. LinkedIn Follow-Up After Connecting

Hi [First Name], thanks for connecting! I often share financial tips and resources for [industry/niche].
If you ever have questions or want a second opinion on anything, I'm always happy to help — no pressure at all.