

COMPLIANCE SCRIPT In-House Telephone Sales

Hello __Client__,

My Name is __Your Name__, I am one of the compliance specialists here at Lee Arnold System. How are you doing today? Good __BDC__ Let me know that you are investing in __Product(s)__ Perfect, I do want to remind you that this call is being recorded for quality and training purposes.

*The purpose of this call is to verify your information in our records; to ensure that you understand the products and/or services included in your investment today, and; to process the payment(s) on your investment. After this call you will receive documentation of the items we discuss. Do you understand the intent of this call and that it will be recorded? **(Wait for Yes or No)***

I am going to take you through our process to get you moving forward I will be asking you questions that I will be needing a verbal response. Let's get started.

*Will you please spell your full name? **(wait for client to respond)***

*Will you please tell me your physical address? **(wait for client to respond)?***

*Will you please tell me your preferred email address? **(wait for client to respond)?***

*Will you please tell me the best telephone number to reach you during normal business hours? **(wait for client to respond)?***

By the way, If you need to contact us for any reason, our Client Success number is 1-800-341-9918.

Our records indicate that as of today's date (say today's date) you have enrolled into our (product name here) at a total investment of (\$ product price \$). Is that information, correct? (wait for client to respond).

I have some information that you need to know.

First of all, it is our sincere desire that you are successful in your real estate endeavors, but The Lee Arnold System of Real Estate Investing cannot predict or guarantee your success as a real estate investor, and only provides this training under those circumstances. Do you acknowledge that your success is dependent upon your own ability to implement the training you receive, and even then, your ability to earn back your investment in education or make a profit from it is never promised or guaranteed? (wait for client to respond)

In addition, please understand that you may cancel this sale up until midnight of the third business day from enrollment, which begins today (say today's date). After the third business day all sales are final and there is a no refund policy in place. If you wish to cancel, you must do so by contacting Secured Investment Corp. in writing either by emailing customercare@securedinvestmentcorp.com or by mailing us a cancellation request to 701 E Front Ave – Second Floor, Coeur d'Alene, ID 83814. Please note that stand-alone and package orders of software licenses, including Dealio.pro, GeoBrander and SendFuse, are non-refundable.

This information will also be available in the invoice you will receive at the email address you gave me.

Do you understand the Return Policy I just outlined? (wait for client to respond)

Let me review the aspects of your investment today:

Today you invested in __Product__Specifics__ (See document) __

Your investment includes a Tuition Reimbursement program __Reimbursement Requirements__ (See document, if applicable)

By completing your training you will be eligible for Special Cogo Financing __Financing Benefit__ (See document, if applicable)

*Because Cogo Capital requires a Business Entity for borrowing your investment today includes a consultation and business filing with **Prime Corporate Services** to help you get your business started the right way. Our fulfillment Department will be calling to get you scheduled for your events and your consultation with **Prime Corporates Services**.*

Does that information conform to the investment you and __BDC__ discussed today? (wait for client to respond)

Do you agree that no additional products or services, other than those just outlined, were promised to you by Lee Arnold System of Real Estate Investing or it's representatives, including additional coaching or mentorship or additional leads and opportunities, and that no income, earnings or profit guarantees were made to you as result of this investment? (wait for client to respond)

*Are there any other questions I can answer for you at this time...? **If yes – answer questions.***

Great, let's get you moving forward with your investment. How many methods of payment will you be using today? (wait for client to respond). (If they respond "Check") I am sorry we do not take checks

How much would you like to put on the first card? (wait for client to respond).

How does your name appear on the card? (wait for client to respond).

Excellent, can you please confirm for me the billing address and zip code associated with this card? (wait for client to respond).

Can you please provide me the full card number? (wait for client to respond)

And the expiration date? (wait for client to respond)

And lastly, the 3 (if Visa, MC, or Discover) or 4 (if AmEx) digit security code? (wait for client to respond)

Do I have your verbal confirmation to charge \$Amount on a Type card with a number ending Last_4_Digits for the investment of Total for Product(s)?

Process card and wait for approval or decline. Repeat this process for any additional cards processed.

Congratulations that/ those payments went through.

(Payment Plan) *You have committed to a Payment Plan on this Investment with payments of monthly amount for number months. If a payment is missed, access to all deliverables (except Dealio.pro) will be shut off, and any earned certifications will be withdrawn.*

(Event Only Non-Payment Plan Partial Pay) *Any balance remaining due at the end of this event is considered an OPTION PAYMENT to secure event pricing and must be paid by 5 pm PT, two days after the event ends, or pricing reverts to regular pricing. We reserve the right to fulfill customer with like-valued products or services if the balance remains unpaid after 5 days following the end of the event.*

(Fulfillment Product) *Thank you so much for your time and congratulations on your investment today! I'm going to get your paperwork finalized and follow this call with an email through DocuSign. We just ask you endorse this agreement and return it to us. You will be sent a copy for our records., You will also be receiving a call from a Fulfillment Specialist to get you moving forward to schedule your event(s).*

(Confirmation Products) *Thank you so much for your time and congratulations on your investment today! - We're excited to get working with you and bring you closer to attaining your real estate investment goals. You will be receiving a call from a Fulfillment Specialist to get you moving forward to schedule your event(s).*

You have a great rest of your day and we will talk soon!