

Setter Script

Hi, this is BDC Name with COGO Capital and Lee Arnold's office, on a recorded line, is this First Name?

Hey First Name! The reason I am calling is that you recently (Insert Lead type here). Is now a good time?

Great, so have you been investing for a while or is this all new to you?

(If they are new)

Why now?

(If they have experience.)

How long have you been investing?

How many deals have you done?

Were they all profitable?

Thank you for sharing that with me, I am glad that we were able to connect today. So, what do you know about us? *(Let them respond.)*

In short, we are a one stop shop for real estate investors.

We teach people how to find great deal and make money in real estate. Then we lend them the money to go out and do what we taught them to do. It's as simple as that... we teach, we lend, you succeed!!!

We use this approach with two primary goals for our clients.

1. The 1st is to generate \$250,000 in liquid cash.
2. The 2nd is to become an accredited investor.

(Only if they ask.) An accredited investor is someone who earns \$250,000 per year or has a net worth of at least \$1MM, outside of their primary residence.

When our clients leverage our money to fund their real estate ventures it does a couple of things for them. 1st, it helps minimize the risk to client's cash reserves. 2nd it helps maintain cash reserves for other projects.

- Does that make sense?
- If you had the proper guidance and the money to accomplish your goals in real estate, how do you think that would benefit you? *(Write as many notes as possible here.)*

So, the first step in developing a strategy for your future, is to get a clear understanding of where we are starting from. To do this, I will be asking you a few questions. Would that be ok?

Perfect, tell me about yourself. *(Listen and take a ton of notes here.)*

(Good questions to ask during this time.)

- What are you looking to accomplish in real estate?
- When would you like to accomplish these goals?
- Why is it so important to you?
- What has prevented you from accomplishing these goals already?

(It is important to use the qualification period as a time of building rapport and aligning yourself with the client. Pay close attention to any roadblocks, challenges, hopes, dreams and other pain points that come up. Also start to think of ways that you can make this person feel like they can be the hero in their own story. Make it all about them and take notes. It will help you in a myriad of ways.)

Thanks for sharing that with me. It's all very important.

Now, are you working or retired?

(If working)

- What do you do for work?
- How long have you been doing that?
- How much do you earn annually?
- What does your retirement look like?
- If you could earn enough income from your investments to replace what you earn, would you make the switch full time?

(If retired)

- How long have you been retired?
- What did you do, when you were setting the world on fire?
- How much does your retirement pay out each month?
- Are you living the lifestyle that you always thought you'd be living during retirement? *(Ask this with empathy.)*

(Everybody)

- How many hours per week can you dedicate to your business?
- Are you married or single? Any kids? What is your spouse's name?
- Is anyone else going to be working the business your business with you?

How much money do you need, in order to feel accomplished?

What would you be willing to do in order to make that money real?

It sounds like you have a great picture of what financial freedom looks like for you. But we all know that we cannot be financially free, until we are debt free... Right? Let's talk about that.

(Build a conversation around these questions. You don't want it to feel like an interrogation.)

- Do you consider yourself to be in light, medium or heavy debt?
- What is your total debt right now? *(Mortgage, auto, other)*
- How much available credit do you have across all your major credit cards?
- Do you happen to know your credit score?
- How much working capital do you have set aside right now for investing purposes?
- What is it so important to become a successful real estate investor?
- What happens if you don't?
- If an advisor were to put together a business plan that would help you achieve your goals in real estate, would you take action today?

Thank you for that. Establishing a starting point is extremely important.

I am simply here to see if you are a good fit to bring on board with our company, to accomplish goals for both you and our company. We do this through lending you money for your own consumption or brokering it to others... preferably both. That is why our motto is we get more of what we want, by helping others get more of what they want.

The ideal candidate would show the following qualities.

- Motivated
- Driven
- Excited
- No Excuses
- Takes responsibility of action or inaction

Would you say these qualities describe you?

Perfect...at this point First Name, it sounds like we have a great fit, but I don't make the decision to bring people on board. The next step is to get you onto Closer Name calendar. He's my Sr. Advisor and has been doing this for a long time. In fact, Closer Name, regularly helps develop investment strategies with our Master Level clients, but I feel in your case because of (drive, determination, lack of time, pick 1 or 2 pain points you wrote down) it would be great to speak with them. Closer Name, will take a deeper dive in to your goals and potentially put together a plan for get you to going Sound good? Keep in mind Closer Name is very busy, but still opens his schedule a few times per week for helping new investors break into the space.

It looks like he has an opening at ___ on ___, or ___ on ___. Which of those would work best for you?
(Make sure you know their time zone, and always quote on their time)

Perfect, I have put you in Closer name calendar at ___ on _____. Because you are motivated, driven and a (Man/Woman) of your word, he looks forward to speaking to you then.

It was a pleasure speaking with you, First Name, we'll talk soon. Have a great day!