



FPFE

Foundation for Personal Financial Education

PRE SET UP MEETING HR INFO



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FPFE SET UP SCRIPT

Hello, is this _____? Hi _____, my name is _____ from the Foundation for Personal Financial Education. The reason that I am calling is that we are a non-profit 501c3 organization that conducts financial educational workshops all across Southern California. We have conducted these workshops at the City, County, State, and Federal levels...as well as the Fortune 500 level. In fact, we currently do all of the training for the County of San Diego employees, District Attorney's Office as well companies like Intel and Solar Turbines.

The workshops are free and are generic they are not sales events, we do not discuss specific companies or products. Most of the workshops are 45 minutes with 15 minutes of question and answer...and are typically done during lunch...kind of a lunch and learn program.

I would like to know if you would have 15 minutes when Mr. _____, one of our Members, could come by and give you some information on our organization and see if this is something that you may want to provide for your employees (members, etc.). Would mornings or afternoons be better for you?

12520 High Bluff Dr., Ste 220 , San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936

www.FPFEnonprofit.org

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization



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CLIENT APPROACH

Hi, is this _____? This is _____ with _____ . How are you doing? I just wanted to call and touch base...how have you been? (basic amenities).

That's great! _____, I need your help with something. I am a member of a speaker's bureau called the Foundation for Personal Financial Education. It is a non-profit organization that conducts free workshops on different financial topics from retirement and college planning to tax and estate planning.

The help I need is the name and introduction to your Training Manager or Human Resources Director. I would like to talk to them about the idea of conducting some workshops for your (company, organization, etc.) Who is the person that I should speak with?

_____, if possible, would you also let them know to expect a call from the Foundation for Personal Financial Education? Don't go into too many details, our seminar coordinator will spend just a few minutes discussing how we may be able to provide additional benefits to your company at no charge.

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Common questions and concerns for HRs

Q: Our 401k Company does this for us.

Response: You know, I understand exactly what you are saying...in fact that is exactly what Intel and IBM said before they had us come in to do workshops for them. We understand exactly what 401k companies and reps do, what Intel and IBM did not realize was what the 401k companies and reps are not doing for you. We do classes on Estate Planning (Wills and Trusts) Getting Fiscally Fit and cash management. We don't want to get in the way of what your 401k company or rep is doing, rather we want to enhance the work that is being done. Also, throughout our experience, we have found that employees like the fact that we are an independent source of information rather than the 401k Company or representative. In addition, this will help further your efforts toward 404c compliance.

So, would Tuesday or Thursday be best for the 10-15 minute meeting?

Q: We have had a bad experience in the past.

Response: I understand exactly how you feel, in fact that is exactly what Intel said before they had us come to do our series of classes for them. Again, our classes are instructional and are in no way sales events....we will not speak about specific products or companies. We understand what companies and employees need and want as well as what they definitely do not want. The fact that we have done classes at the City, County, State, Federal, and Fortune 500 levels should give you an idea that we do exactly what we say that we are going to do.

So, would Tuesday or Thursday be best?

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Q: We are concerned with bringing in an outside group to speak to our EEs.

Response: I agree, you should be concerned with bringing anyone in to speak to your employees. In fact, this is exactly what IBM said as they interviewed us. They had tried to conduct financial education classes on their own and quickly realized that they were not qualified or educated on these matters enough to teach it. The reason that they selected us was because of our extensive track record in conducting employee education. I don't think that the City, County, State, Federal Government, or the other Fortune 500 companies would have had us in or would continue to have us in if they did not love what we provide them.

So, would Tuesday or Thursday be best for you?

Q: What is in it for you?

Response: We gain a tremendous amount of exposure in the community as well as receive great personal satisfaction from the people that we help. Additionally, it helps to fulfill some of the pro-bono requirements that some of our members have.

So, would Tuesday or Thursday be good for you?

Q: I am too busy right now can you send me something?

Response: Absolutely, could I please have your fax number? I am going to fax over some brief information on us and then, when would be a good time to call back to review?

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Q: How are you funded?

Response: We are funded entirely through donations and through our speakers. It costs very little, other than time on our part, to operate our organization....thankfully.

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THE INITIAL MEETING WITH HUMAN RESOURCES

Above all, it should be brief (10-15 minutes) unless they have questions. Your goal is to simply convey the benefits of FPFE and what FPFE can do for their group.

PRESENTATION TO HR

Thanks for taking a few minutes to see me. Did you have a chance to go through the information that we faxed to you? Great, let me tell you a little about us. We are a non-profit organization comprised of a group of professionals that conducts workshops on various financial topics at no cost. The workshops are generic; we don't mention any companies or products and they are not sales events. The workshops are typically 45 minutes with 15 minutes for questions. We usually do them at lunch, kind of a "lunch and learn". Everyone can bring their lunch.

Typically, we set up a series of workshops and start with Getting Fiscally Fit and go from there.

I've got some information that I'd like to go through if we could. I have attached my biography so that you have that. This sheet will show you just some of the places that we have done work for. Review with the H.R. (Emphasis on city, state, county, federal and Fortune 500 companies.)

This sheet gives you an idea of our classes. (Run through the classes briefly) Typically we start with Getting Fiscally Fit, then Estate Planning, Retirement Planning, Real Estate, and Long Term Care.

As I said, we usually do a series of workshops every 3 weeks to 1 month.

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This next sheet is an evaluation that I have all of the attendees complete. There are 3 sections. The first asks what they liked about what we did. The 2nd asks areas or topics of interest. This gives you and me a road map for future topics.

And at the bottom, if they want to come in for consultative work, they can and it should be noted that we do not bill for their consultations...whether they come in once or ten times we do not bill. If they don't want to come in they can check "no" and they won't be called or go on any mailing list.

Also, I have included a couple of "love letters" so you can see what others have said about us.

From a promotional standpoint, we will help you promote all events. We have flyers that we will provide you so that you really don't have a lot of extra work to do.

- Do you have any questions?
- How do you feel about what we covered?
- When would be a good time for (program coordinator) to follow up with you?

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