



LIVE PERSON:

This is [Name] at [Company Name]. This is a courtesy call to remind you of your reservation for the workshop on [date]. We will be covering [Strategies to Maximize your Social Security Benefits or Taxes in Retirement]. It will start at [start time] and will run for approximately [length of presentation]. Do you need any additional information? We'll see you then!

ANSWERING MACHINE:

This is [Name] at [Company Name]. This is a courtesy call to remind you of your reservation for the workshop on [date]. We will be covering [Strategies to Maximize your Social Security benefits or Taxes in Retirement]. It will start at [start time] and will run for approximately [length of presentation]. If you need additional information, or if you can no longer attend the workshop, please call us at [phone number]. We'll see you then!

IF THEY CANCEL ON THE CALL:

Ok, that's fine... we do have some other upcoming [Social Security or Taxes in Retirement] workshops, would you like to attend of those?

IF YES:

Here are the upcoming dates and location... would one of these work for you? [if so, confirm date, time)].

IF NO:

We'll cancel your reservation. And what we can do, is schedule some time to go over what will be covered in the presentation. Would you like us to do that?