**SCRIPT FOR YOUR 1st RV APPOINTMENT – IF YOU HAVE CURRENCY with or without ZIM – but NO Projects**

* Hi, since I have no projects…I was wondering if it would be a good time to ask to meet with someone to discuss the advantages of leaving funds at your institution and reviewing a document regarding perks and concierge services…
* If additional time is required…… I am happy to schedule an appointment for two weeks from now since I may also be meeting with other firms to discuss their potential offerings

**SCRIPT FOR YOUR 1st RV APPOINTMENT – IF YOU HAVE CURRENCY with Dong/Dinar project and No ZIM**

* Hi, since I have a dinar/dong…I would like to be introduced to someone who can listen to the summary of my project and subsequently can negotiate with treasury for humanitarian funding – I would like this project to be funded with funds other than those I just received in exchange for my currency…. Who might that be and is this a good time for that discussion or should I plan to come back?
* Additionally… I was also wondering if it would be a good time to ask to meet with someone to discuss the advantages of leaving funds at your institution and reviewing a document regarding perks and concierge services…
* If additional time is required for one or both …… I am happy to schedule an appointment for two weeks from now since I may also be meeting with other firms to discuss their potential offerings

**SCRIPT FOR YOUR 1st RV APPOINTMENT – IF YOU HAVE ZIM (with or without currency) and Projects**

* ADVISE THEM **IF** YOU ARE 70+ AND ASKING ABOUT THE REDUCED AMT. LUMP SUM PAYOUT
* Deliver a very **brief** overview of your projects …and you can use the ZIM **REDEMPTION PRESENTATION ‘TALKING POINTS’** – or make it even shorter and mention the total amount you want for your projects—this is to let them know that you are serious about submitting projects

**SCRIPT and hints FOR YOUR Interviews with Trust Mgmt companies – IF YOU HAVE ZIM (with or without currency) and Projects**

* Hi, I have recently come into a great deal of wealth and am interested in finding a team to assist in the management of funds …I was hoping you might be able to spend some time exploring the possibility of me becoming a client of your organization
* Here you might want to put together a list of generic style questions to help you ascertain the viability of using this organization --- sample questions are available in the latest document room and Texas Snake has posted some general questions you might want to ask of a wealth manager or trust mgmt. company
* Try to determine if this organizations would work for you from a regular money management perspective ……THEN --- bring in the humanitarian aspect
	+ In addition to the funds I have already received, -as you are probably aware we have been given the opportunity to utilize humanitarian funds in support of altruistic objectives. I have some projects that I would like to submit for utilization of humanitarian funds– one is a project specifically designed to provide care for family, friends and community and my other project is global and deals with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.
* I may be interested in retaining the services of your organization to not only manage some funds but to assist me in refining my projects and negotiating on my behalf ----providing we can agree on terms and can come to a mutually agreeable service agreement
* To that end---- do you have any knowledge/experience in the field of \_\_\_\_\_\_\_\_\_\_\_\_
	+ What are the things you might do to ensure my projects are accepted and approved?
	+ Looking at my total figures – do you see an issue with these numbers?
	+ With the assumption that my projects get approved—and those assets would remain under your management ….on a yearly basis – what perks and concierge services could I be looking at as trustee?
	+ If I also left my personal funds from this redemption at your organization, what interest would I get?
	+ What guarantees are offered ?
	+ How do you see the yearly disbursements for my family and community project being handled?
	+ Do you have an administrative arm? --- a family office that would assist with the administration – and what fees are reasonable ( assume that they will be paid from project funds -- but still should be reasonable)
	+ NO Need to provide all project details during the interview phase
* Get all answers before hiring anyone – you can have a subsequent meeting to “contract” with company once you have interviewed a few --- take notes then weigh answers, determine if you can work with these folks – then go to contract step

THIS IS A LOT OF MONEY AND HUGE GOALS – NO NEED TO WRAP ALL UP IN ONE OR TWO MEETINGS -- take time – do your due diligence