

## **AFEA Free Consultation & Strategy Session Disclosure Script**

Use this script to help students understand why they are signing the release document and help you transition to your for profit advisory services.

**Mr. & Mrs. Prospect:**

**Ok, before we get started with your free consultation, I have some housekeeping requirements to take care of for AFEA. As you know AFEA is a nonprofit organization that offers General Education only. They do not offer specific product recommendations or advice.**

**During this consultation you may ask that I make suggestions and advice based on your actual circumstances and assets.**

**Signing this form releases AFEA and its affiliates from any of the recommendations that I may provide you.**

**It was written by an attorney so I apologize for the legal terminology!**

Give your prospects a chance to read it and then begin the consultation as you normally would all first meeting consultations.

**\*\*Note – The AFEA Free Consultation & Strategy Disclosure form is a mandatory requirement that must be signed by you and your students and kept on file for each strategy session/consultation conducted from an AFEA workshop or Course.**

**Please fax all signed forms to 877-459-2217 on the 15<sup>th</sup> and 30<sup>th</sup> of each month.**

**To Your Success!**

**Team AFEA**