Federal Employee Advocates

Appointment Setter Guide

FEA

Helping Federal Employees Build
Their "Bullet-Proof" Federal Retirement

Our Appointment Setters are the engine that drives our growth. Every three weeks we conduct free Webinars where 15,000 federal employees attend so they can learn how to better plan for their federal retirement. We are the most knowledgeable and recognizable experts in this arena. The federal government administers their federal retirement, they DO NOT manage it; a huge difference. We help them MANAGE their federal retirement at no cost to them.

Every week we will send you an Excel Spreadsheet with anywhere between 240 to 510 federal employees (with all of their information) who had registered at one time in the past, for one of these Webinars. The number that we send you depends on which Level of Appointment Setter Program you have elected to participate in. Don’t ever delete those spreadsheets, because you may need to refer back to them at some point in time, if you run out of names to call in any given week. Circling back to those you left messages for and didn’t respond is commonplace.

Your mission is to set up a free 15-minute Telephone Conference with your assigned Advisor(s) and those federal employees who are in your Spreadsheet. We expect that for every hour you work, you will set one appointment. Don’t panic if the first few weeks you don’t get there. This is a marathon not a sprint.

Don’t be pushy or try to sell them on taking an appointment. We are trying to help them plan for a better federal retirement. We don’t charge federal employees for anything we do, nor does the Advisor. Creating the “Value Proposition” for the federal employee to accept the appointment and building a rapport with them is the key to success.

Rapport:

Before you make a call, I would google them (maybe their phone number or Linkedin) to see if there is some commonality between you and them. Example: they are a member of something you are a member of or have knowledge about, mention it. If not, you have their state and town so Google that to see if something is there you can refer to. A new hospital, a new bridge anything upbeat and happy to start the conversation. If not, then look at their email. See what federal agency they work for. Start the conversation after you identify yourself, with something like "*I see you work at the EPA, what do you do over there?*"

Also make sure you leave a good voicemail if they don't pick up, and that your phone's voicemail message has your name in it and your caller ID has your name on it. Make your voice message short and sweet.

Value Proposition:

Now that we are done with rapport, what about the "Value Proposition?" Why should they take the appointment with the Advisor? The answer is because we have a lot of free resources the Advisor can go over with them. Much of this is on your assigned Advisor's Landing Page. Here are just 7:

1. **The Federal Employee Benefit Maximization Guide eBook.**
2. **Monthly Webinars: www.federalwebinars.com**
3. **TSP Video: www.federalemployeeadvocates.com/tspvideo/**
4. **TSP Calculator: www.federalemployeeretirement.com**
5. **Roth IRA Calculator: www.federalretirementcalculator.com**
6. **Roth IRA Video: www.federalemployeeadvocates.com/rothiravideo/**
7. **200 Articles and whitepapers**

Brian’s Information:

Brian’s Landing Page: https://www.federalemployeeadvocates.com/brian/

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