

PFR Advisors - Full Sales Script Package

- **© Chosen Campaign Strategy:** "Before You Max Out Your 401(k)..."
- **Target Audience:** High-income professionals earning \$150K+ (especially in law, finance, consulting, medicine)

Why This Strategy?

- Large, scalable audience
- High income = high contribution potential
- Strong pain point: traditional retirement plans are underperforming and overtaxed
- Kai-Zen solves this with leverage, tax-free growth, and zero market downside

Persuasion Frameworks Used

- NLP Patterns: Open loops, future pacing, emotional contrast
- Hormozi Value Lens: \$1 in = \$5 out + safety + leverage
- Cialdini's Principles: Scarcity, Authority, Reciprocity, Consistency
- **Jordan Belfort:** Curiosity hooks + straight-line persuasion
- Sandler: Pain-first conversational tones

SMS Outreach

Hey [First Name] — quick question:

Are you putting money into a 401(k) or IRA and hoping it's enough?

I work with professionals earning \$150K+ who are tired of paying taxes twice and getting weak returns.

Got 15 mins Tuesday @10am? I'll show you a strategy using bank funding + life insurance to create \$100K+ tax-free retirement income.

- [Your Name] | PFR Advisors



Voicemail (Concise, Open Loop)

Hey [First Name], this is [Your Name] with PFR Advisors.

I just reviewed a strategy that turns a few years of funding into decades of tax-free retirement income — and I immediately thought of you.

If you're maxing out a 401(k), this could be a serious upgrade.

Call or text me back at [number] or grab a time here: [link] — talk soon.

Email Series (Executive Version)

Email 1 - Subject: "401(k)s weren't designed for people like you."

Hey [First Name],

You make great money—but chances are your 401(k) and IRA will end up taxed, capped, and underwhelming.

At PFR Advisors, we help high-income professionals like you use bank-funded life insurance to create a personal, tax-free retirement strategy — often delivering \$90K-\$150K/year in income, with added protection benefits.

Want to see how it compares to your current setup?

- Takes 15 mins
- ✓ No cost
- One strategy = retirement income + illness protection + legacy plan

I've got Tuesday at 10am open — does that work for a quick Zoom?

— [Your Name]

PFR Advisors

[Your Booking Link]

Email 2 – Subject: "This is how wealthy people really retire."



Hi [First Name],

The wealthy rarely depend on 401(k)s. They use *leverage*.

Our strategy lets you:

- Use your income to unlock bank funding (you only pay ~25%)
- Grow money *tax-free* (no 401(k) taxes)
- Create lifetime income + living benefits

Example: A 45-year-old client puts in \$40K/year for 5 years. The bank adds 3x more. At 65, they're pulling \$100K+/year, tax-free.

Want me to run the numbers for your income range?

I have Tuesday 10am open — want it?

— [Your Name]

Email Series (Assistant Version)

Hi [Assistant Name],

I'm hoping to connect with [First Name] for 15 minutes to share a powerful executive benefit strategy. It's something many of our clients use to boost retirement income while reducing tax exposure.

We work with high-income professionals and partners in law, consulting, and finance — many use this in place of or alongside their 401(k) plans.

Could we set up a quick Zoom on Tuesday at 10am or Thursday at 1pm?

Thank you so much,

— [Your Name]

Cold Call Script (Human)

Hey [First Name], it's [Your Name] from PFR Advisors — did I catch you for a quick minute?



➤ (Yes)

Great — I work with professionals earning \$150K+ who are maxing out their 401(k)s... but realize it won't be enough to retire how they want.

What if you could use bank funding + a unique life insurance plan to turn your next 5 years of savings into \$100K+/year in tax-free income at retirement?

Would you be open to a 15-min call Tuesday at 10am to see what it looks like for you?

Cold Call Script (Al Agent)

Hi, this is Jessie with PFR Advisors.

I'm reaching out because many professionals earning over \$150K are looking for better ways to build tax-free retirement income—beyond the 401(k).

Our strategy uses bank leverage to help you create long-term income, protection, and legacy planning in one plan.

We're offering short calls to see if it's a fit—would Tuesday at 10am work for a quick consult?

Inbound Al Agent – Opening Line

Hi, welcome to PFR Advisors!

You're probably here because you're doing well financially... but want to do even better in retirement—without taxes eating it all up.

We use a unique strategy that blends bank-funded life insurance with tax-free income and lifetime benefits.

Would you like to schedule a free, 15-minute consultation to see if this works for your situation?

☐ LinkedIn DM + Connection Request

Connection Request:



Hey [First Name] — came across your profile and thought it made sense to connect. I work with high-income professionals building better retirement strategies than the typical 401(k).

DM After Accepting:

Thanks for connecting, [First Name]!

I help execs earning \$150K+ turn a few years of smart funding into a lifetime of tax-free income — all using a little-known strategy the wealthy use every day.

Want a quick breakdown? I've got Tuesday at 10am open.

% Video Script (30–60 Sec)

"Most high-income professionals think the 401(k) is the best retirement tool. But it's taxed, capped, and totally market-dependent.

At PFR Advisors, we use a strategy the wealthy have used for decades—life insurance funded mostly by the bank—to build massive, tax-free income.

You contribute for 5 years, and the bank adds 3x more. At retirement, you pull \$100K-\$150K per year, tax-free.

Want to see how it works? Book a 15-min Zoom. I'll run your numbers."

What to Expect in the Meeting – Video Script

"Hey, [First Name]! Here's what to expect on our quick 15-minute Zoom:

- We'll ask a few questions about your income, retirement goals, and current setup.
- ✓ We'll show you how this strategy compares side-by-side to your 401(k).
- ✓ You'll get a custom projection showing your potential tax-free income at retirement.

There's no pressure or hard sell — just useful info.

By the end, you'll know if this is something worth exploring.

Look forward to chatting with you!"

