

**Dr. Joan Haakonstad's
Worth Unlimited Script**

Have you heard about the Worth Account program?

What I say:

The Worth Account program is a web based, financial GPS that looks at income, looks at debt, looks at monthly expenses and mathematically calculates the fastest way to pay off loans and to build savings / emergency funds. It then tells you step by step, turn by turn, the fastest way to pay down your loans / build savings given your unique financial situation. Most of our clients pay off their loans, including their mortgages in as little as 1/3 to ½ the time.

For example, Eric (my husband) and I have been using this program for over 6 years and we are set to pay off our 29 year mortgage in only 9.1 years - We are saving over \$327,000 in interest and almost 20 years of payments. And, we did this:

- Without refinancing,
- Our monthly payments remained the same,
- And there was no change in our monthly budget!

Would you like to see if you qualify?

Great, it is pretty simple. All you need to do is gather your most recent debt statements – your mortgage statement, credit card statements, auto loans, student loans – any type of debt you may have. Gather those statements together and I will refer you over to the corporate office. Corporate will collect your balance, payment, and interest rate on each of your loans and then schedule an appointment with one of our Worth coaches to show you the program, how our program can help you, and answer any and all questions you may have so you can make an educated decision about whether or not this is right for you.

Can you have those statements together by tomorrow at _____ time or is _____ at _____ time better for you to make that initial call?

***NOTE: Change the above underlined / red info to YOUR situation.

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If They Need More Information

The Worth Account Program is a web-based program that is like a GPS one uses in the car. Have you ever used a GPS? *(wait for response)*

Great, then you know that you input the address where you want to go and the GPS system guides you step by step, turn by turn on how to reach your destination. If you miss your turn or hit road construction – no problem – the GPS will recalculate and find you the next fastest route to reach your destination.

The Worth Account program is very similar however it is for your finances. The program looks at your income, your debt, and your monthly expenses, and all variables associated with each of these, and then mathematically calculates the fastest way for you to reach your destination – to pay off your loans and to create a savings account or emergency fund if that is important to you. It then provides you step by step, turn-by-turn directions on how to reach your financial goals. We all know that finances are dynamic – they change; sometimes you have extra expenses like tires for your car, a water heater for your house, or extra money coming in. As your finances change, no problem, simply tell the program and it will instantaneously recalculate to find you the fastest way to reach your goals, given your new financial situation.

Again, the best way to see how the program works is to see how it can work for you. Gather your debt information together and I will refer you over to the corporate office. They will walk you through the system.

REMEMBER: You are NOT the expert on the Worth Account system (even if you are). So, if they keep asking questions let them know:

Those are great questions. And, although I use the system, I am not the expert on the program; but, I can get you in front of the expert. Just get your debt statements together – your mortgage, credit cards, auto loans, student loans, etc... and I will refer you over the Corporate office. They will collect general information from you like your balances, payments, and interest rates, and then they will set an appointment with a Worth Coach who will review the program with you, how it will help you, and answer any and all questions you may have.

Is tomorrow at _____ good for you, or is _____ at _____ better?

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How to Transition to Worth or Lead the Client Prospect to Want to Hear More

Couple things that will help whether you are talking to a Client or Agent prospect:

ASK lots of Questions to help find out what is important to your prospect (for both clients and agents). What is important to you may not be important to them. So find out what is important to them and let them know how the Worth Account system will help them with those goals.

And, you can lead a client prospect through the process with questions:

1. Are you still paying on your mortgage?
2. How many years do you have left?
3. Would you like to cut that in half?
4. Have you heard of the Worth Account program?

Then, go into your script above (page 1).

Additional Notes for Client Prospects:

Also, do NOT use the videos and websites unless you need to! If someone is ready to move forward, do NOT stop the process by saying you will send them more information or that they need to watch a video. It is NOT necessary – go straight to setting the appointment with Worth.

The videos and replicated sites are meant to be supplemental tools to help if someone is just not ready to move forward. If you go through the script above and someone is not ready to call over to Worth and give their financial information, then use the videos and websites.

Also, I find it better to actually do a 3-way call to introduce the client prospect to Worth Unlimited. It edifies Worth more and it helps to personify Worth – it helps the client prospect associate a real person to a company. This increases the probability of the client maintaining their appointments. If at all possible, do 3-way calls, even if it is after hours and only used to set an appointment for Worth to call the client back (analysis hotline is open 24/7, but only collects info M-F 0800-1900 MDT). Only use the appointment schedule in the back office if absolutely necessary.

Additional Notes for Agent Prospects:

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I use the script on page one with everyone – client and agent prospects.

And, if someone is interested in learning more, I do NOT re-invent the wheel. I send them to the Opportunity Meetings with Corporate on Wednesdays or to a LIVE event if applicable in the prospect's area. If someone is not available during that time frame, set an appointment with them and then have them watch the recorded opportunity meeting done by corporate.

Note – you can use the Opportunity webinar with client prospects also. Just press stop before it gets into the Opportunity side of things.

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