

## Who Do You Know? Text Message Scripts

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This worksheet contains professionally written, sincere, and humorous text messages for all 32 prompts in the 'Who Do You Know?' list. Use these scripts to open conversations with potential clients or team members with confidence and authenticity.

### 1. Just got married?

**Professional:** Hey [Name], congrats again on tying the knot! Big life changes like this are a great time to get your finances organized. Would you be open to a quick convo to make sure you and your spouse are financially protected and on the same page with your goals?

**Funny:** Marriage is like a joint bank account—if you don't plan together, someone's going to overdraft! Want to set up a quick financial strategy chat?

**Sincere:** Hey [Name], just married? That's a big milestone. Let's connect to ensure your new financial chapter starts off strong.

### 2. Just had a baby?

**Professional:** Hey [Name], congrats on the new addition! A lot of new parents overlook how important it is to plan for their child's future. Can we connect for 15 minutes to go over a few strategies?

**Funny:** Hey [Name], diapers, bottles...and don't forget a financial plan! When's a good time to chat for 10-15 minutes?

**Sincere:** Congratulations! A new baby means new responsibilities. Let's talk about securing their future.

### 3. Makes \$100k a year?

**Professional:** Hey [Name], I work with professionals in your income range to help them protect and grow their wealth. Open to a quick chat about how to make your money work smarter?

**Funny:** You're making great money—now let's make sure it's working just as hard as you are. Want to hop on a call?

**Sincere:** Let's talk about how we can turn that six-figure income into long-term financial independence.

### 4. Just changed jobs?

**Professional:** Hey [Name], congrats on the new role! Did you move your old 401(k) yet? I can show you some options that might offer better growth and flexibility.

Funny: New job, who dis? Time to talk 401(k) rollover options!

Sincere: Hey [Name], big move! Let's review your old retirement plan to ensure it's aligned with your new goals.

### **5. Just retired?**

Professional: Hey [Name], congrats on your retirement! Have you thought through how to turn your savings into income for life? I'd love to share a few strategies.

Funny: Now that every day is Saturday, want to make sure your money lasts longer than your Netflix queue?

Sincere: Retirement's here! Let's make sure your assets are structured for long-term income and stability.

### **6. Talking about retirement?**

Professional: Hey [Name], I heard retirement's on your radar. I help people build plans to make sure they retire comfortably. Want to book a quick call?

Funny: Retirement is exciting—but a plan makes it real. Want to walk through a few options?

Sincere: If you're daydreaming about beach life, let's talk about turning that into a funded reality.

### **7. Wants more time with family?**

Professional: Hey [Name], if time with family is a big goal, I can show you how smarter money strategies can help you get there faster.

Funny: Hey [Name], are you building a life or just clocking hours? Let's talk financial freedom.

Sincere: Your kids won't remember your office hours—but they'll remember the time you spent. Let's talk strategy.

### **8. Needs to make more money?**

Professional: Hey [Name], if you're looking for a way to boost income, I might have something flexible that could work for you. Want to hear more?

Funny: Need a bigger paycheck without a bigger boss? Let's chat about options.

Sincere: Hey [Name], if extra income is on your mind, I have something that might fit your schedule and goals.

### **9. Just sold a business?**

Professional: Hey [Name], big congrats if you just exited your business! I help people like you figure out the smartest next steps with that capital.

Funny: Sold a business? Let's make sure your money is working harder than you had to.

Sincere: Hey [Name], if you recently exited, it's a great time to build a financial strategy for long-term growth.

### **10. Owns a business?**

Professional: Hey [Name], as a fellow entrepreneur, I wanted to see if you've explored ways to protect your business and build long-term wealth.

Funny: Your business is your baby—let's make sure it grows up financially secure.

Sincere: Hey [Name], have you had a financial checkup for your business lately? I can help.

### **11. Works in real estate?**

Professional: Hey [Name], I work with professionals in real estate who want to diversify income and protect commissions. Open to exploring a smart financial strategy?

Funny: Real estate is hot—but so are taxes. Let's chat about how to keep more of what you close!

Sincere: You help others find home—let me help you build one financially. Let's connect for a few minutes.

### **12. Works in mortgage?**

Professional: Hey [Name], you already help families build wealth through real estate—want to learn how to build your own with a flexible income stream?

Funny: Mortgages and money go together like PB&J. Let's see if your income can rise as fast as rates!

Sincere: You help people with their biggest purchase—let's talk about securing your long-term financial goals.

### **13. Works in medical field?**

Professional: Hey [Name], many healthcare pros I work with want more time, money, and impact. Let's chat about an option outside the hospital walls.

Funny: You save lives, but who's saving your retirement? Let's check your financial pulse real quick.

Sincere: Your work matters—so does your future. I'd love to show you how we help healthcare heroes get ahead.

### **14. Works in law enforcement?**

Professional: Hey [Name], I've helped several officers put a strong financial backup plan in place—can we set up a 15-minute call?

Funny: You protect and serve... but is your money protected and served too? Let's investigate!

Sincere: I respect the work you do—let's make sure your finances are just as secure as the people you protect.

### **15. Works in military?**

Professional: Hey [Name], I specialize in helping military families build wealth during and after service. Want to learn how to leverage your TSP and more?

Funny: If you can survive boot camp, financial planning will be a breeze—let's do this!

Sincere: Thanks for your service. Let me serve you now with a plan that honors your future.

### **16. Works in HR?**

Professional: Hey [Name], HR leaders like you care about people—how about helping them win financially too?

Funny: You manage open enrollment—time for your financial wellness checkup!

Sincere: You empower people at work—let's talk about empowering them financially too.

### **17. Works in education?**

Professional: Hey [Name], educators like you make the best financial teachers. Want to explore how you can earn while you educate others about money?

Funny: You teach math—now let's make those numbers work for \*you\*!

Sincere: You've dedicated your life to teaching—let me show you how to make your financial life just as fulfilling.

### **18. Works in the trades?**

Professional: Hey [Name], tradespeople know the value of hard work—I'd love to show you how to build wealth alongside it.

Funny: You fix stuff... how about fixing your finances next?

Sincere: I respect your hustle. Let's see if we can put your skills to work building a long-term financial plan.

### **19. Works in the service industry?**

Professional: Hey [Name], if you're great with people and want more financial freedom, I'd love to show you what I'm doing.

Funny: You serve tables—how about serving your future some financial growth?

Sincere: You take care of others every day. I'd love to help you take care of your own financial future.

## **20. Works in network marketing?**

Professional: Hey [Name], if you're already building in network marketing, you'll love the flexibility and growth here too.

Funny: You already know the side hustle game—want to see one that pays like a main hustle?

Sincere: You've got grit and drive—let me show you how we turn that into long-term success.

## **21. Working multiple jobs?**

Professional: Hey [Name], working more than one job shows serious work ethic. Let's talk about smarter ways to earn more without burning out.

Funny: You've got more jobs than The Rock. Want to make one of them work for your future?

Sincere: I admire your hustle—maybe there's a way to help you work less and earn more.

## **22. Laid off recently?**

Professional: Hey [Name], if you're exploring next steps after a layoff, I'd love to share an option that puts you back in control.

Funny: Laid off? Time to fire up a new game plan—and this time, be your own boss!

Sincere: I know that's tough—if you're open, I'd love to show you something that could be a fresh start.

## **23. Wants career change?**

Professional: Hey [Name], if you're ready for something new and meaningful, I'd love to introduce what I do and why it's changing lives.

Funny: Ready to leave the cubicle for good? Let's chat—I've got options!

Sincere: If your heart's not in your current job anymore, I've been there. Let's explore a better fit.

## **24. Influential on social media?**

Professional: Hey [Name], if you're already making an impact online, I'd love to show you how to monetize your voice with a cause-driven mission.

Funny: You've got followers—ready to lead them into financial literacy?

Sincere: You influence others with purpose—let's team up and bring value to more people.

## 25. Charismatic leader?

Professional: Hey [Name], your leadership skills are next-level. Have you ever thought of leading a mission in financial education?

Funny: Your charisma could sell sunscreen to a vampire. Let's use it for good—and maybe some cash flow!

Sincere: People naturally follow you. I'd love to show you a way to lead them to financial transformation.

## 26. Knows a lot of people?

Professional: Hey [Name], you've got a powerful network—have you ever explored how to turn that into income and impact?

Funny: You know everybody. Let's make that Rolodex rain money!

Sincere: You're well-connected for a reason—people trust you. I'd love to show you how we can help others together.

## 27. Best salesperson you know?

Professional: Hey [Name], I'm expanding my team and looking for driven, people-oriented individuals—sound like you? Let's talk.

Funny: You could sell ketchup popsicles to people in white gloves. Ever thought of a new industry to dominate?

Sincere: We're building something special and need top-tier sales talent. You came to mind immediately.

## 28. Best teacher you know?

Professional: Hey [Name], we're looking for educators who want to teach people how money works. Your skillset could be a great fit.

Funny: You explain things better than Google. Want to use that gift to help people become financially literate?

Sincere: We need clear communicators who care. Thought of you—interested in learning more?

## 29. Most enthusiastic person?

Professional: Hey [Name], your energy is unmatched. I'm building a team and need people like you who know how to inspire.

Funny: If we could bottle your energy, we'd retire rich. Let's talk about channeling that into something impactful.

Sincere: Looking for energetic leaders to teach and grow with us—you'd be an amazing fit.

### **30. Most ambitious person?**

Professional: Hey [Name], your ambition really stands out. Ever consider building a business in financial education? Let me share what we're doing.

Funny: Hey [Name], if your ambition had a speed limit, it would've been pulled over by now. Want to explore something bigger?

Sincere: You've got the drive—we've got the platform. Let's talk.

### **31. Most money-motivated person?**

Professional: Hey [Name], if increasing your income is a top priority, I'd love to talk about an opportunity that's changing lives.

Funny: You like money. This industry has lots of it. Let's talk.

Sincere: Hey [Name], I know you're financially motivated. This opportunity could be the next level.

### **32. Works on commission only?**

Professional: Hey [Name], since you already get the commission world, you'll love the freedom and earning potential we offer—let's connect.

Funny: No salary cap, full control. Sound familiar? Let's chat.

Sincere: I know you understand commissions. Let me show you a platform with exponential potential.