

Introduction

The way you introduce this business and what you do is arguably one of the most important things to master. Starting with the problem first creates curiosity. Our learning element creates curiosity. The quiz is approachable considering we're not pushing a product. The book can establish credibility. Offering to send the quiz, give them a book or asking a question invites engagement.

So, what do you do?

1. Start Here (Approx. 40 Words): "You know how people often feel unsure about money—like they're winging it with no real plan? I fix that. I teach people how money really works—the stuff we all should've learned in school, but didn't."
2. Bridge to the Quiz (Once Interest Is Sparked): "We actually start with a quick Financial Literacy Quiz. It gives you a score—kind of like a GPS giving you your location. Once you see where you're starting, we can help you map out the best path to your goals, whether that's saving more, getting out of debt, building wealth, or even building a business."
3. Optional Add-On (To Offer the Book): "The quiz is based on the book I teach from—simple, practical, and eye-opening. I can send you the quiz link and get you a copy of the book too. It's an easy read, but it can completely shift how you think about money."

Engaging Questions

Many times, people will engage. Sometimes, they won't. In both instances, the best way to facilitate engagement and keep the conversation moving is asking questions. Here are some of our favorites:

1. Most of us update our phones every year — when's the last time you updated your financial knowledge?
 2. If you had to give yourself a grade on your financial literacy right now - A through F - what would it be?
 3. What's the most important thing you've learned about money?
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1. How do you like what you do?
 2. Have you ever considered something different?