

"Hi, This is XXXX from YYYY

I'm calling about your PPP loan. Who would I talk to about that?"

GET THE NAME OF THE DECISION MAKER HERE

Great, are they available right now?

NO – "OK, no problem. When would be a good time to reach them?" (OR) "OK, no problem. When can I set an appointment to chat with them?"

ASK FOR DIRECT NUMBER AND EMAIL ADDRESS

Ask to leave a VM Message:

Yes: See page 3 Leave VM Message One

No: Thank them and say good bye.

AFTER REACHING DECISION MAKER:

"Hi This is XXXX from the YYYY, Is this (DECISION MAKER NAME)?"

Great, I'm calling about your Federal pandemic assistance....

It looks like you received funds. However, my records don't show whether you also received your Employee Retention Credit yet. Did you apply for this yet?"

YES – "OK, great! So you filed for it and received it?"

YES AGAIN – "I'm glad to hear that. That was the reason for my call today. Thanks for chatting with me. Bye"

NO – "Oh, you definitely need to apply for that. Chances are you'll qualify for up to \$26,000 per employee. The funds are paid directly to your company and never need to be paid back." Would you be interested in applying for this?

YES – SEE Page

NO – "Oh, ok. This is free money from the US government that's owed to your company. Can I ask why you don't want to claim your fair share?"

YES

Ok let me get a little data from you to set you up.

GET THEIR INFORMATION TO FILL OUT THE FORM. (FILL IN YOUR FORM ON LINE)

Ok you are set up for an interview, you will get a call from our CPA's in the next 24 to 48 hours, they may need some tax forms from you, are your 2020 and 2022 tax returns easy for you to access?

"Yes"

Ok then you are all set. Best of luck I hope you qualify for a lot of money!

If you have any questions, you can call me at 000 000 0000

Thank you good bye

ALTERNATE QUESTIONS:

WHO ARE YOU?

We provide qualification services for businesses that were impacted by the pandemic.

Your chances of being approved are quite high. And you can receive up to \$26,000 per employee. The credit covers 2020 and 2021.

The qualification process is of course provided no charge to you. And you will know exactly how much money you are due.

Let's schedule your qualification interview.

WHAT IS THAT? / WHAT IS ERC / WHAT IS AN EMPLOYEE CREDIT?

"It's called ERC, or ERTC. It stands for Employee Retention Tax Credit. It's a federal government program like PPP, but it's better since it's not a loan. It is a reward for businesses that kept people employed during 2020 and 2021 employees The funds get paid directly to you from the Treasury Dept. and never have to be forgiven or paid back.

Because you qualified for the PPP loan your chances of qualifying are very good for this program.

It is possible to qualify for up to \$26,000.00 per employee.

I can get you started with the qualification process right now. I'll just need to confirm a little information...

GET THEIR INFORMATION TO FILL OUT THE FORM. (FILL IN THE FORM ONLINE)

HOW MUCH DOES THIS COST?

"There is never charge for our qualification process. If our CPA's determine you qualify and you hire us to claim the funds for you... there's a fee once you receive your funds.

You're not obligated to work with us and we only help you find out if you qualify for the program.

I can get you started with the qualification process right now. I'll just need to confirm a little information...

First, I'll need ... **GET THEIR INFORMATION TO FILL OUT THE FORM. (FILL IN THE FORM ON LINE)**

VM MESSAGE ONE

Hello (Their Name)

This is (Your Name) with YYYY.

I am calling because we do not show you have applied for your Employee Retention Credit yet. You are most likely qualified.

The credit is up to \$26,000 per employee.

I am not calling to sell anything. We simply provide you the service of doing a full qualification work-up and of course this service is free of charge

Please give me a call back and let's schedule your qualification interview ASAP, Before the funds are depleted.

Thank you,
My name is (Your Name)
My number is (xxx xxx xxxx)
