**LEVEL I SCRIPT - GENERIC**



Good day. May I please speak with Mr./Mrs. <*Full Name as Registered*>?

Hello Mr./Mrs. <*Last Name*>. My name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

I’m calling on behalf of your current investment with \_\_\_\_\_\_\_\_\_\_\_\_\_\_ on a recorded line to confirm you have received the proxy materials sent to you for the upcoming meeting scheduled for \_\_\_\_\_\_\_\_\_\_. Have you received the information?

***If “Yes” or positive response:***

If you’re not able to attend the meeting, I can record your voting instructions by phone...

***If “No” or negative response:***

I would be happy to review the meeting agenda and record your vote by phone.

***[Be prepared to read proposals]***

...Your board has recommended a vote IN FAVOR. Would you like to vote along with the recommendations of the board?

Would you like to vote all of your accounts accordingly?

Thank you, I am recording your [FOR/AGAINST/ABSTAIN] vote.

* For confirmation purposes, please state your FULL NAME?
* And according to our records, you currently reside in <*CITY/STATE/ZIP*>?
* To ensure we have the correct street address for the confirmation, please state your full STREET ADDRESS?

Thank you. You will receive a confirmation of your voting instructions within 5 days. If you have any questions, please contact us at the toll free number listed on the confirmation.

Mr./Mrs. <Last Name>, your vote is important and your time is appreciated.

Thank you and have a good day.