

First Meeting Introduction Script

This is the basic introduction I use for my local Chamber of Commerce, Rotary, Investor group etc. This is just a road map to help you start your conversation to attract Angel Investors. Use this in your own words to make it sound like a natural conversation.

TIPS:

This first impression is so very important. You are selling yourself. **YOU ONLY GET ONE CHANCE. BE PREPARED!** Please make sure you are dressed appropriately for the audience you are going to speak to. I went to an investor meeting where most people were wearing jeans and dressed casually. I did not wear jeans! I wore a nice golf shirt and a pressed pair of cotton slacks just a slight notch above the crowd.

Please talk slowly. Do this with conviction, resolve and confidence. Practice at home, in your car or in front of your bathroom mirror. I do! I will admit that it is a little odd listening to your self, but it is highly effective!

Remember, **the goal of this first introduction is to create enough interest so you can send them your Accredited Investor Form** by getting their contact information. Once you receive the signed and completed form, you can call them and meet personally to discuss more detail about what you are doing and how you are setting up your deals.

Basic Introduction that I use:

Hi. My name is _____. The name of my company is _____. We buy self storage facilities in local and emerging markets. They produce good cash flow with a strong back end. I am always looking for partners (PAUSE) and I am willing to give you an equity position.

If you would like more detail, I would be happy to talk with you.

It is that simple. This is **SELLING NOT TELLING!** You only want to create interest.

After this very short introduction, some people will be interested in knowing more. Here are some key phrases to throw into your conversation. Every conversation will be a little different, but the result should be the same. Since the key word phrases below are general, you may also want to incorporate them into your intro. Just remember to keep your conversations simple, concise and short.

“We take a conservative approach.....”

“If you are interested in investing, I give my investors the majority of the cash flow and the majority of the equity. I want you to have a lot of incentive to participate in my deals”

“We only buy in areas where there is a predictable path of progress.”

“The local Chamber, Economic Development Group and US Census Bureau have provided us extensive information that we have used to identify where we need to acquire our investments.”

“We buy B properties in B areas that have both a value play and a momentum play. That way there is plenty of opportunity to increase the value of our investment.”

“We typically want to be in and out of a market place within 3 to 5 years depending on where we come in on the cycle.”

Handling objections you should NOT answer until you have an established relationship such as:

How much do you need to participate in your investment?

What kind of return are you paying?

How much money can I make?

This is your opportunity to close for the “Accredited Investor Form”!

ANSWER:

“Since our company is SEC (Securities and Exchange Commission) compliant, we follow all of the rules and the regulations set forth by the SEC. What I would like to do is send you the “Accredited Investor Form”. Once I receive it back signed and dated, I will call you to set up a meeting (lunch, over coffee etc) to discuss the details of the business including how all of this will work, the kind of returns etc. I can answer all of your questions at that time.”

This is the close! Please make sure you get their contact information so you can send the form and follow up.

Congratulations! Once you receive the form, you have closed one of the most important parts to getting your deal done.

Parting thoughts:

I may not know what the future holds-but I know who holds the future. -Lou Holtz

In order to succeed-you don’t always have to know “how,” but you must always know “you will.” -Bill Bartmann