

## **Phone Scripts**

### **Facebook:**

Hey \_\_, my name is \_\_.

I'm just getting back to you in regards to the post that you responded to on Facebook for information on the state regulated final expense programs.

And just to authenticate the call can you confirm you put here your favorite hobby/color is \_\_, do you remember doing that?

(if not: it's probably something you had filled out or your daughter or someone like that for you, anyhow, it's regarding state regulated final expense programs, the one that pay off your funeral and outstanding debts you might leave behind. Remember that now?)

Okay, I'm the local field underwriter in county area and my job is to sit down with you, go over your health criteria, and figure out which programs are gonna be available for you, does that make sense?

Are you still working or are you retired?

\_\_\_\_\_

Okay great,

I'm gonna be back in your area \_\_, I can put you down \_\_, about \_\_, any reason you might not be home around that time?

It's gonna be like 5-10mins,

I can put you at \_\_, any reason you might not be home?

\*verify address, house color, number on mailbox, etc.

Once again, my name is \_\_, I will be the representative coming out to see you on \_\_ at \_\_.

Okay thanks.

Bye.

## **Mortgage Protection:**

Hello \_\_, my name is \_\_\_\_.

I'm giving you a call back from the mortgage protection office regarding the loan you have with (bank).

The reason I'm calling is you had filled out a request in the mail to get some information on paying off your home in the event of a death or a disability. You put hear that your birthday is \_\_\_\_, is that correct?

Great, once again my name is \_\_\_\_ and I'm the field underwriter assigned to get you the information.

My job is to verify your health and see which programs you qualify for. The purpose of my call is to see what times you are usually home so I can find a day to put you in my schedule.

It looks like I will be right down the street on (Tuesday) and I can put you down for (six or eight) which one of those would work best for you?

Great I look forward to seeing you on (Tuesday) at (six) and do you have any big gates or big dogs in the front yard that I need to worry about?

All right well I look forward to meeting you on (Tuesday) at (6 o'clock) have a great day.