

ORPHAN PLUS LEAD SCRIPT

Hey ____ This is _____ with GLOBE AIL, the reason for my call is it looks like back in ____ your (relation) (name) had listed you as a main point of contact on their accidental death benefit and the agent who set this up is no longer working that area so the home office threw this on my desk and asked me to reach out to you personally and let you know we didn't forget about you!

Did ____ ever mention anything to you about this to you?

NO: Okay worries, I'll fill you in quickly, heaven forbid something should happen to ____ you are listed on their persons to be notified list. Which means you will need to know how to file a claim if they should pass away, and since you're taking on such a big responsibility, our home office is giving you the same no cost benefits ____ has. Which includes a no cost 2k accidental death benefit, a health services discount card and a free will and testament. You're also going to have access for a limited time to some of the most exclusive permanent benefits that traditionally veterans and union have had access to over the last 80 years, but you have to qualify for those.

YES: Great! That makes my life much easier!

SO ____ my job is simple, I just walk you through setting up your no cost benefits and show you what you're entitled to, doesn't take long as I am very busy! They want us to make sure if you have a spouse that they are present as well. Are you married, divorced, or widowed? **(Make sure if they have a partner that they are present)**

Since it's all virtual now it's a super quick and seamless process. We just need to get you on a quick ZOOM call and run through this. Are you by a smart phone, tablet, or computer by chance? Ok great I'm going to send you zoom link really fast just to make sure our benefits portal is working properly. Okay, let me know when you get it.

(WALK THEM THROUGH DOWNLOADING ZOOM AND GET THEM ON ASAP. ONCE THEY ARRIVE THEN WAIVE TO THEM AND TRY TO FLIP! (ONE OF TWO THINGS WILL HAPPEN))

1 THEY GO WITH IT. DO QUICK FLIP PRESENTATION BE IN CHARGE AND BE READY!

#2 THEY DON'T HAVE TIME - OK NO PROBLEM, I'M VERY BUSY BUT I CAN DO LATER TODAY EITHER ____ OR ____ WHICH IS BETTER? (BOOK APPT)

PLEASE GRAB A SHEET OF PAPER AND JOT DOWN MY NAME AND YOUR APPT-TIME SLOT. ALSO JOT DOWN YOUR CONFIRMATION NUMBER, IT IS ALP601. PLEASE MAKE SURE YOU'RE IN A QUIET PLACE FOR OUR CALL, IS THERE ANY REASON YOU SEE YOURSELF MISSING THIS APPT? OKAY GREAT, DON'T FORGET ABOUT ME BECAUSE I WON'T FORGET ABOUT YOU. TALK THEN!