



Final Expense Phone Script

John (Client's Name), It's Brent (Agent's Name). I'm getting back to you about the form you had filled out on FB (over the weekend) or (yesterday) in regards to the State regulated life insurance programs to cover your burial and final expenses, looks like you put your favorite hobby down as (_____) is that you? Then I have the address at (_____) is that correct? Perfect, well look my job is real simple. I'm just the field underwriter that has been assigned to get that information back out to you. The way these programs work is they're non medical. Which means they don't require a blood draw or physical exam, they just send me out to verify an ID and any medications you're taking. Typically takes about 5-10 minutes to see what you may be eligible for.

Are you working, retired, or disabled?

Working: Okay, what time are you typically home from work?

Retired: Okay, do you have any appointments tomorrow?

Disabled: Okay, do you have any appointments tomorrow?

(the idea is to clear their schedule and understand their schedule before you open up yours to them, a lot harder to object if they've already told you when they'll be home)

Are you married, single, or widowed?

Married: Okay, I will need both of you guys there when i come by. What time works best for both of you to be there?

Single/Widowed: Okay

Now I don't have a lot of time tomorrow, like I said it takes 5-10 minutes. I have a time tomorrow at either 10am or 2pm, which works best for you?

Tie down the appointment : Do the numbers show up on the mailbox or the house? What color is the house so I know I'm at the right place? Is it okay if I pull right in the driveway or should I park on the road?



Final Expense Mortgage

John (Client's Name) , It's Brent (Agent's Name) . I'm just getting back to you about that form that you had received in the mail and sent back to my office in regards to paying off your loan/mortgage with (Bank Name) if you died or became disabled. I have the address at (_____) is that correct? Well look, my job is real simple. I'm just the field underwriter that has been assigned to get that information back out to you. The way these programs work is they're non medical. Which means they don't require a blood draw or physical exam, they just send me out to verify an ID and any medications you're taking. Typically takes about 5-10 minutes to see what you may be eligible for.

Are you working, retired, or disabled?

Working : Okay, what time are you typically home from work?

Retired : Okay, do you have any appointments tomorrow?

Disabled : Okay, do you have any appointments tomorrow? (the idea is to clear their schedule and understand their schedule before you open up yours to them, a lot harder to object if they've already told you when they'll be home) Are you married, single, or widowed?

Married : Okay, I will need both of you guys there when i come by. What time works best for both of you to be there?

Single/Widowed : Okay

Now I don't have a lot of time tomorrow, like I said it takes 5-10 minutes. I have a time tomorrow at either 10am or 2pm, which works best for you?

Tie down the appointment : Do the numbers show up on the mailbox or the house? What color is the house so I know I'm at the right place? Is it okay if I pull right in the driveway or should I park on the road? Are there any big dogs I need to be aware of?

Tips: Leadrilla: Don't say the words "Life Insurance", instead use "state regulated burial and final expense programs".