



Mortgage Protection

(Client Name) this is (Your Name) with the mortgage protection center. I am calling because you have a mortgage with (Mortgage Company) on your home at (Address). (wait for response)

Perfect. Well, you had filled out a mortgage protection card and I am the person in charge of getting that information back out to you. It looks like they have me in your area on (Day Running). I am just trying to see if morning or afternoon is the best time to get this information you had requested? (wait for response)

Perfect. Is (30 min Time) or (30 min Time) the best time for you and your wife? (wait for response)

OK perfect. Let me just make sure I've got the address correct, you're located at (Address)?

Are the numbers on the house or the mailbox? Is your house in a gated community?

What color is the home so I can recognize it from the road? OK great.

Alright (Client Name) write this down, my name is (Your Name) and I will see you and your wife at (Day and Time).



Final Expense

(Client Name) this is (Your Name) with the Senior Benefit Center. I am calling you back because you had filled out a form looking for the new state regulated life insurance programs, that will help pay for your funeral costs with no physical exam required. (wait for response)

OK perfect. I am just the person in charge of getting this information back out to you. It looks like they have me in your area on (Day Running). Is morning or afternoon the best time to get you this information you requested back to you? (wait for response)

OK perfect. Is (30 min Time) or (30 min Time) the best time for you and your wife? (wait for response)

OK great. Let me make sure I have the right address, that's (Address)?

OK, and the color of your house so I can recognize from the road? (Wait for response)

OK perfect.

Alright (Client Name) grab something and write this down, my name is (Your Name) and I will see you and your wife at (Day and Time).

Facebook Final Expense



(Client Name) this is (Your Name) with the Senior Benefit Center of (Town). I am calling you back because you filled out a form online with Facebook. It looks like you were wanting information on the new state-regulated life insurance program. I'm your local agent in charge of getting this information you requested back out to you. (wait for response)

OK, perfect. It looks like they have me in your area on (Day Running). Is morning or afternoon the best time to get this information you requested back to you? (wait for response)

OK, perfect. Is (30-min Time) or (30-min Time) the best time for you and your wife? (wait for response)

OK, great. Let me make sure I have the right address. That's (Address)? OK, and the color of your house so I can recognize it from the road? (Wait for response)

OK, perfect. Alright, (Client Name), grab something and write this down. My name is (Your Name), and I will see you and your wife at (Day and Time)