

# No Cost Will Kit Intro

## **A1 INTRODUCTION:**

Hi (JOHN) I am (your name) with American Income Life, today I will be handling your benefits that you requested. By the way is (MARY) there, these benefits apply to her as well?

Now normally (JOHN AND MARY), we've been going to union member homes for the past 70 years to go over their benefits. (JOHN), you should probably grab a pen and paper to take notes as this information is very important.

## **A2 Reason for meeting:**

You are probably wondering why I am here?! I don't know if I told you on the phone (JOHN), but I am actually the benefits representative for all the unions like the police and firefighters. Not only do we do the Last Will & Testament kits for the Safe Life Network, but we do all the permanent benefits for all the union families in \_\_\_\_\_(CITY) as well (SMILE). What they mean by permanent is that everyone has benefits through work but when you leave your job, change careers, or retire your benefits go away. So, the union set up permanent ones that fill in all your gaps you don't already have through work so whenever you do change jobs or retire, you get to take these with you and they do not expire! The Safe Life Network started to realize that most families requesting these Will Kits obviously don't want to leave a financial burden on their family when they pass, right? They have also realized that the majority of the families in \_\_\_\_\_(CITY) have no benefits at all or only temporary benefits through work. So they teamed up with us to allow all families in the community that have requested these kits to have a chance at receiving the union's benefits as well, for the whole family. Make sense now? (SHOW EXCITEMENT)

I am here for three reasons:

1. I have your \_\_\_\_\_ (#) Last Will & Testament kits. I will go over how to fill them out properly.
2. I will go over your no cost benefit package.
3. The most important reason that I am here, is that I am going to see if you can actually qualify for the permanent union benefits that all the local police and firefighters have. I am going to let you know right now, it is going to be really hard to qualify, most people don't.