

Union – Credit Union – Association Introduction

A1 INTRODUCTION:

Hi, (JOHN)? I'm (NAME) with American Income Life I talked to you yesterday about your benefits you requested thru your *union/association/credit union*. By the way, is (MARY) there? These benefits apply to her as well.

(JOHN), Do you get very involved with your (union/credit union/association)? Do you go to your meetings? Do you read the newsletters? (LOOK A LITTLE SURPRISED IF THEY SAY NO) Ahh, that's why you aren't familiar with this.

A2 REASONS 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 representative that takes care of the permanent union benefits for all the unions. We don't just take care of your benefits through your union. We also do the permanent benefits for the firemen, the police, the veterans, etc. 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. A few years back your union president realized that the other local unions already had something in place, so he signed a contract so you and your family can finally have the permanent benefits that all the other unions are receiving! (SHOW THEIR LETTER ON YOUR SCREEN) The permanent benefits 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! Make sense now?

I am here for two reasons:

1. I have a no cost union package from the _____ (NAME OF ORGANIZATION). We will go through that first.
2. 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 other local unions members have. I am going to let you know right now, it is going to be really hard to qualify, most people don't