# FEX Appointment Setting Script

*Introduction* Hello, (**Client's Name**]? Hi, (**Client's Name**) this is (**Agent Name**) and I am giving you a call regarding the Final Expense Life Insurance you requested more information on.

I'm calling because this is the type of coverage that if anything happens to you (or your spouse) you can leave behind some money to cover funeral/burial related expenses to leave your family some peace of mind, that's what you are looking for correct? Perfect!

Now, I have your address listed as _____? Is this Correct?

I also have your date of birth listed as _____? Is this correct? Now, is this something your spouse would be interested in as well or would it be for yourself only?

*If Someone Else: Great, what's (His/Her) name and date of birth so that I can gather for my notes.*

*If No One Else: No problem, the reason I ask is because typically the information I receive only captures one individual and I want to make sure I can provide details for everyone in the household.*

Now, I get quite a few responses per week, so I do need to go through a very basic screening of your health… Are you currently in good health? *(If Spouse, ask for theirs, as well)* Great!

In the past 7 years, have you been treated for any of the following:

Cancer | Heart Attack | Stroke | Heart Failure | COPD | Diabetes requiring Insulin, OK Great! (*Thank you for that if they list one*)

How about the small stuff like High Blood Pressure | Cholesterol | Anxiety/Depression | Thyroid? OK Great! (*Thank you for that if they list one*)

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So, (**Client's Name**), the reason I asked the questions is because I am broker and underwriter. What the means for you is that I am going to shop and customize the best plan to fit your situation and, most importantly, your budget.

What I like to do for my clients is set up 15-20 minutes at the most to get together and go over all your options and of course, answer all your questions and if you see something you like, great! If not, no problem! Fair Enough?

(**Client's Name**) is now a good time for us to go through those options?

**If YES**: *Continue with original script.*

**If No:** *Of Course! I understand, typically most of my client's prefer scheduling at a time where they can provide their undivided attention to make the best decision.*

Let me check my schedule really quick and see when the best day and time I have available for us to revisit. (**Provide 3 different Best Day's and time**)

Which one of those options work best for you?

**When Client Selects Date**: Perfect, now just to make sure before I book this time slot. Is there any reason you can think of that would keep you away from our next meeting?

**IF YES**: I'm glad I asked just to be sure. When is a better time and day for us to lock in?

**IF NO:** Ok, Great! I am going to lock in that date and time for us.

I'm going to send you a text message with all my contact information, as well as the day and time that we set. If you have any questions until then feel free to text me or call me.

OK, (**Client's Name**)! I look forward to speaking with you on (**Day**) at (**Time**).