

Master FB Burial Leads Script

Introduction: Hi, it's (Agent Name). I am getting back to you regarding the details you provided in your search for burial and final expense coverage. Have you found what you were looking for, or are you still in the process of exploring options?

OR

Hey (Client's Name), this is (Agent Name) and I'm getting back to you on the form you filled out on Facebook requesting information on the final expense programs. You had listed your desired beneficiary as (Beneficiary Name), is that correct?

I have the information ready for you, do you have a quick pen and paper handy? Let me know when you're ready.

Write down:

(My name) & (License #)

Can you read that number back to me? So, I know you have that down correctly? Perfect, this number is my identification with the state, please keep this for your records.

I see here your DOB is (10/10/1960)? How young does that make you?

(Client name) just curious. When you responded to our ad, what was it about the ad that attracted your attention?

What were you hoping to get out of the conversation today, just so I have a better understanding?

Great, taking a step back, I'd like to ask a few questions to make sure I could even help you in the first place...

For example, were you looking for coverage for yourself or for someone else as well? (Let them explain)

Got it, Can I ask you what type of life insurance policies do you currently have now?

If yes:

-How long have you had it for?

-What made you go with that type of policy if I could ask?

If no:

-Ok, what has prevented you from moving forward in the past in case something was to happen though?

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-Now, have you been looking around and just haven't found anything yet? ...if you could walk me through that...

If yes - What are you looking for in a policy that you maybe feel that you haven't found yet?

Why **now** though?

Were you looking to take care of cremation or traditional burial? (Let them explain)

(If burial): Are you opposed to cremation if it could save you a little bit?

Who would be the person held responsible for handling everything (or the beneficiary) for when you do pass away? (Let them explain)

Now to take a step back again, say if things stayed the same and say you never had coverage in place, how would that impact (beneficiary's name) financially?

(Hesitation) Mhhmmmm... how do you mean by that?

Would you want (beneficiary's name) to have to pay for that? *[ASK IN A CURIOUS/CONCERNED TONE]*

What would that do for you **personally**, knowing that this is something you have taken care of and (beneficiary's name) won't have to be left with the bill down the road?

Just so you know how this works, I am licensed with the state, so I don't work with any specific insurance company, there's over 15 companies that I work with on a regular basis. Essentially, I help people look at all their options and see what might best fit their needs. Does that sound okay?
(Let them agree)

Now, I will ask you a few medical and financial questions just to see how much you can qualify for. Okay? (Go to financial inventory)

Good news is I did find an insurance company that may be potentially willing to approve you so these are the 3 plans I found for you. (List 3 options)

There are two things to write down about this type of coverage:

1. This coverage **NEVER** expires
2. The price **NEVER** increases

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Closing Question: Now like I mentioned, these programs are based on if you can get approved with the insurance company, and if you are able to get approved what amount of coverage would make the most sense for you to leave behind to [beneficiary's name]?

Beneficiary Section of Application - Get AT LEAST:

- 1 primary beneficiary
- 1 contingent beneficiary
- 1 emergency contact
- Get all of their phone #'s, date of birth, and their relationship to the insured