

MP Appointment Setting Script

Introduction Hello, (Prospect's Name)? Hi, (Prospect's Name) this is (Agent Name) and I am giving you a call regarding the mortgage protection response card you sent in on your loan through _____ [Bank Name].

I'm calling because this is the type of coverage that if anything happens to you (or your spouse) the **entire mortgage gets paid off for you and your family**. This was what you are looking for, is that correct? Perfect!

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

And the loan amount is _____ [loan amount]? Perfect, is this a new home purchase or refi? What is the new monthly mortgage payment?

I also have your date of birth listed as _____? And your (Husband/Wife) listed as _____ Is this correct? Great!

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)*

So, (Client's Name), the reason I asked the questions is because I am broker and underwriter. What that 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?

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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)**.