



## BASIC PHONE SCRIPT

Hello (client name), this is (your name). I am calling about the request you sent in to us on your loan with (name of bank/financial institution). It's about the mortgage life and disability coverage.

The reason I am calling is I am the person that goes over the information and options with you. My company has me dispatched to your territory next (day(s) you're in their area). This only takes about 20 to 30 minutes. Do you work during the day? I am calling to find out what time of day works best for you and (spouse's name, if applicable), mornings, afternoons, or evenings? Now, when you say evenings, are you saying closer to 5:30 PM or 8:00 PM? Is that the same for both of you?

Great, I will put you down for 7:30 PM. Could you please get something to write on? Please write down my name (repeat your name to the client) to go over your Mortgage Protection options, 7:30 PM on Thursday evening.

Now, I have your address at (verbalize the address info found on your lead), is that correct? What is the nearest cross street? Great, now (repeat client name) I need to ask you one more question. Not everyone qualifies for all of the plans that we offer because of pre-existing medical conditions. Is there anything I should know about the health of you or (spouse's name, if applicable) that may not allow you to qualify? Are you on any medication? Have you had any major operations in the last 20 years?

Ok then, I will see you Thursday at 7:30 PM!