

Phone Script / Web conference FE

Hello, may I speak with ___ please? Hi ___ this is ___ calling from senior benefits. We had mailed a card out to you a few weeks ago you filled it out and sent it back to me. It's the one that said you may qualify for a state-regulated plan to help pay for your funeral expenses.

I'm the field underwriter for your area and normally we are required to come out and see you, but considering current events, we are handling this over the phone and internet.

Now ___, do you have access to a computer, laptop or other smart device that allows you to access the internet?

If yes – Great! Let me get some of your basic information and then I can go over this with you (or you both) via our Zoom web conferencing service.

If no – That's ok! We can just do this the old-fashioned way and I can just go over it with you on the phone, ok!