

## Final Expense Lead Card Script 2

Hello\_\_\_\_\_, this is \_\_\_\_\_... How are you today? Anyway, the reason for my call is that you recently filled out a little card and you wrote down your information on it and you mailed it into my office about the Final Expense and Funeral Benefit plan, and the reason I am calling is to verify the information you sent us.

Your address is\_\_\_\_\_ is that correct? Is there an apartment number or is this a house?

It says your age is \_\_\_\_ (and your spouse's age is\_\_\_\_, is that correct?)

\*If No spouse age then ask "You didn't put down a spouse age, is it JUST YOU?"

OK, now normally I'm required meet with you face to face to figure out what you qualify for... however, in light of social distancing, we are just setting up phone appointments to go over the information. The call should only take about 15 minutes (if a spouse is listed) and I do need you BOTH present.

What works best for you (both)? Mornings, afternoons or Evenings?

(Set appointment and get email if they have it to forward the zoom meeting ID)

Ok, great, it was nice speaking with you, and we look forward to seeing you "Day, Date, and Time"...  
Bye.