

PHONE SCRIPT



Hi _____. This is actually (Your Name). I was calling in regards to your mortgage with _____. Now, I'm actually the field underwriter that was assigned to the paperwork that you had sent in to us- about making sure your loan would be paid off, in the event of death or disability.

Lets see, so (Client) you had put your date of birth down as (XXXX). Your full address was (XXXXXX) and the loan was for roughly XXXXX. Does that sound right? Good, is there a Missus/Mister? Now (Client), when you had sent this in were you looking to make sure that the loan would be paid of for (your spouse) if something were to happen, (or are looking at covering both you)? Are you (both) working full time or retired? What time do you generally get home during the week?

(Client), again the reason I was calling is- I was assigned to the paperwork you had sent in to us. So my job is that I'm just required to chat and verify the information with you, and to go over some of the options. When you had sent this form in, you actually created a file. And my job, being the manager in this area, is that I'm in charge of closing the file out. In order to close it, I have to go over the information with you (and your spouse), and we either decide to close It or I'm able to help you get the coverage. Now, I'm going to be in your area tomorrow and the next day. Do mornings, afternoons, or evenings work best for you (both)? And what time will (both of) you be home? Okay, I could squeeze you in at (X) and (X). Which of those times work best for you? Great, and the numbers for your house is it on the mailbox or house? Well, I'm going to be showing up in (your vehicle) at- what time did I say? Okay, is there any reason you (both) wouldn't be there? Great, now if you could give me about 15 minutes on either side of that. I will be meeting with several families, and might be a little early or little late. Okay, well then I will see you on (X) at (X).