Beneficiary Rollover Script- Contacting the Beneficiary

"Hello ________ **(Ben/EC)**, this is _________ **(Agent Name)** with Primerica. Your __________ **(Relationship)** ___________ **(Client Name)** recently took out a policy with us. Did he tell you I would be calling?" *(wait for response)*

"Great! The reason for my call is to make arrangements to get you his/her certificate so that in the event of his/her death, you'd know exactly what to do. I just sent you a form, please let me know when you receive it." *(wait for response)*

"Awesome. It has your information on there. Can you verify that all is correct?"

"Great! Well __________ **(Ben/EC)**, what concerned ________ **(Client)** the most was income replacement. He/She wanted to make sure if he/she passed, whomever raised his/her children would have money to do so for at least 10 years. Let me ask you ______ **(Ben/EC),** if you died today, what do you have in place to keep your paycheck coming to your family for the next 10 years?" *(wait for response)*

"I just sent you a form *(send the DIME form)*, let me know when you receive it. *(once received, go over income replacement part only)*

"I just sent you one last link (send Zoom link) to complete this process. Let me know when you've received it." *(wait for response)*

(pick up DIME through insurance, close, go to referral program)