

## Beneficiary Rollover Script – Getting the Names

“Who’s your primary and contingent beneficiaries?” *(wait for answer)*

“Ok, awesome! What’s their name and phone number?” *(write down the beneficiary’s name and number)*

“Listen, one of the biggest challenges in insurance is that often death claims aren’t paid. To ensure your claim is paid out, we make sure we get the beneficiary certificate out to \_\_\_\_\_ **(Beneficiary)** and \_\_\_\_\_ **(Contingent)**. We need 3 Emergency Contacts as well.”

“So, if you’re stuck out on the road and it’s 3 am and you can’t call your beneficiaries. Who would you call?” *(wait for answer)*

“Ok great, put \_\_\_\_\_ **(Person Named Above)** as your first emergency contact.”

“Let’s say you get two tickets to the Super bowl, and it’s your favorite team against their biggest rival. You can’t take \_\_\_\_\_ **(Beneficiaries)** and you can’t take \_\_\_\_\_ **(1<sup>st</sup> Emergency Contact)**. Who are you taking to the game with you?” *(wait for response)*

“Great! We need one more emergency contact. If you received 2 gift certificates to Ruth-Chris Steakhouse and you can take anyone you want except for the people you’ve already named. Who are you taking?” *(wait for response)*

“Ok. I have just sent you a text message. I would like for you to send it out to all five people you just listed. *\*See text message below\**

### TEXT MESSAGE

Hello, I know you’re probably busy, but I just updated my life insurance policy and made you point of contact in case something was to happen to me to assure my wishes are honored. My agent \_\_\_\_\_ **(Agent Name)** will be calling you in the next day or so to go over my information. Look out for his call from \_\_\_\_\_ **(Agent Phone Number)** in case it shows up Scam Likely. I need you to get my updates. Thanks.