



## FINAL EXPENSE TELEPHONE SCRIPT

### B Leads

Hello, is this **(CLIENT NAME)**? My name is **(YOUR NAME)** and I want to let you know that this is NOT a solicitation.

#### **GIVE AND GATHER INFORMATION**

The reason for my call is that I am the person responsible for delivering the information you requested, sometime ago mailed back to us a card in response to a letter, we mailed you, which you requested information on a state-approved final expense plan. ? **(CLIENT NAME)**, **There are only three reasons people fill out this card. One they have no burial coverage and do want to be a burden to their children or grandchildren, they have some coverage and do not want to burden to their children or grandchildren or they have plenty of coverage, and want to leave a gift of love to a family member or church, what was your reason (CLIENT NAME)**

Now, **(CLIENT NAME)**, since this is a state-approved program, the state of **(STATE IN WHICH YOU ARE WORKING)** requires us to visit you in person to deliver the item in person and cannot be mailed. I am the person will you show how you cannot leave a burden for as little as pennies a day. **Go right to set appointment text.**

#### **SET APPOINTMENT**

I will be delivering information to your area on (Day) \_\_\_\_\_ or (Day) \_\_\_\_\_ is (Day) \_\_\_\_\_ at (Time) \_\_\_\_\_ OK.

**If Not willing to set appointment,** **(CLIENT NAME)**, I assure this is not a high pressure sales situation, we will be are not interested, I will shake your hand and wish you well **Go right to set appointment text.**

## **QUALIFY CLIENT (Only after Confirming Appointment)**

**(With the exception of MA, we have guaranteed issue products , so schedule all appointments)**

- Verify age (inquire about spouse)
- Do you use tobacco in any form?
- In the past 2 years, have you had any life-threatening conditions such as heart attack, stroke, or cancer?
- Have you ever been diagnosed with AIDS/HIV or prescribed oxygen?
- Are there any other health issues that we need to know about?

## **CONFIRM APPOINTMENT**

O.K., (**CLIENT NAME**), I will see you on (**APPOINTMENT DAY AND TIME**). Can you check your calendar and make sure you have no doctors' appointments or babysitting duties, is your spouse also available. **PAUSE LET THEM CHECK** (change if conflicts) IF NO CONFLICTS, Great , Now, is your address still (**ADDRESS ON CARD**)? Can you take out a piece of paper, the appointment is day \_\_\_\_\_, time \_\_\_\_\_, My Name is \_\_\_\_\_ my phone number is \_\_\_\_\_ if you need to change. I look forward to seeing you, Have a great day!!!