

FINAL EXPENSE TELEPHONE SCRIPT

Hello (client's name), Hi (client's name) this is (your name) with Illinois Senior Benefits, how are you doing today? (WFA) Just to let you know this is not a sales call. The reason for my call is that you recently responded to the card we mailed you, that was talking about the New State Regulated Programs to pay for final expenses. Funeral Cost. It's my job to make sure we get you the information you requested, I just need to verify some information real quick so we can get this out to you.

- I see here you live at (verify current address) is that still correct?
- You listed you date of birth as (verify date of birth) is that correct?
- And your husband's date of birth is (verify date of birth of spouse) is that correct?
- Did you want this information just for yourself or there any other adults that will be needing information as well?
- If no age is list, ask. (so that we make get you the proper information may I have your current age please, how old are you?

SET THE APPOINTMENT

We actually have a state licensed representative that will be in your area this week, Monday and Tuesday. Generally speaking when is the best time to catch you at home, (Morning or afternoons?) Ok great, this(Monday) I have a 9:30 or a 9:45 witch is better for you? **Book the appointment!!**

CONFIRM APPOINTMENT

Mrs. Client, please do me a favor and grab and pen and paper so you can write down some important information. Wait for them to get a pen and paper Let me know when you're ready. Ok, I have you scheduled to meet with our State licensed representative (Joe

Johnson) on Monday at 9:30. Please write down this information, as we have set aside the time especially for you. One other real quick note, so we don't take up to much of your time please have all your prescriptions out so (Joe agent's name) can get the correct spelling and doses of your medications.

One last thing before I let you go, is there street parking where you live or is the driveway better? And where are you house numbers located?

Ok great, thank you for your time and (Joe) will see you Monday at 9:30.

Have a great rest of your day