

Joe J Mgt Protection Supervisor B Lead Script

Hi Bob,.... Bob my name is John and I'm a supervisor with the mortgage protection center here in XYZ county and I'm doing an investigation on a form you had filled out and sent back to our company, do you have just a minute to answer a few questions? WFA Back on (state the date) May 27th 2015 you took out a loan in the amount of (state the dollar amount) \$250K with (state the Mgt company) Wells Fargo Bank is that correct? WFA Shortly after that you had taken the time to fill out a form and send it back to our company. This form was talking about a mortgage life and disability program that would pay for your mortgage in the event of death or even disability. Does this ring any bells? WFA....

The situation is that we have this form with your request for information, but we have no record that this has ever been taken care of. Do you recall has anyone ever contacted you regrading your request? WFA.... Bob let me ask you a straight forward question. Are you still concerned that in the event of your death or disability that this loan would be paid for to protect your family? WFA...

Like I said I'm the supervisor for the company and I've been assigned to handle your case, in fact my company has me scheduled to be in your area over the next few days.

SET THE APPOINTMENT

Generally speaking when is the best time to catch you and your wife at home, (Morning, afternoons or evenings?) Ok great, this(Monday) I have a 9:am available, or do you need something a little later? **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 for Monday at 9:30 am. Please go ahead and write down my name so you know who is coming to your house. My name is John Smith and so I don't take up to much of your time please have all your prescriptions out so I can get the correct spelling and doses of your medications ok.

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 I will see you Monday at 9:30.

Have a great rest of your day