

# “A” Direct Mail Lead Phone Script by Joe J

Hello (client's first name), Hi this is (Joe), the reason for the call is that you recently filled out the card we mailed you that was talking about the New State Regulated Programs to pay for burial and final expenses, and it's my job to make sure we get you the information you requested. Now, (client's name) Is it better for me to drop the information off in the morning or is the afternoon better? WFA Ok, when you say morning is around 9 to 9:15 ok **Book Appointment**

Let me just verify the information I have before I let you go

- 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 spouse's date of birth is (verify date of birth of spouse) is that correct?
- 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?)

## **CONFIRM APPOINTMENT**

(client's name), 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, Just to confirm I'm going to drop by around 9 am. Please go ahead and write down my name so you know who is stopping by. My name is (agent name) I'll be wearing an ID badge.

One last thing, is there street parking where you live or is the driveway better? And where are you house numbers located? And just so you know I will be driving a black SUV

Ok great, I will see you tomorrow morning at 9. Have a great day.