

Internet Phone Script by Joe J

Hello (client's first name) this is (**Joe**), I'm getting back in touch with you in regards to your online request for information about the State Regulated Burial and final expense programs approved in (Illinois), It's the one that ask for your beneficiary and you put down (your daughter April) is that correct? WFA I am the local State Licensed Field Underwriter here in (State or County) that has been assigned to get you the information you requested, but before I go any further, I just need to verify your DOB as (May 17th 1955) is that correct? The address you listed is (975 Maple St Apt3) is that correct? Ok great. 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**

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.