



**Family First Life Phone Scripts**

Let's protect some families!!

# Generic Script for ALL Lead Types

## [ Part 1 – Who are you and where are you calling from? ]

John?

Hey John, this is (yourname).

**FEX:** I'm **getting back to you** about the form you sent back in to help pay for funeral and burialexpenses

**MTG:** I'm getting back to you about the form you sent back in to help payoff the house in caseof a death or disability

**Internet Life:** I'm getting back to you about the form you filled out online for life insurance.

## [ Part 2 – Verification ]

- My job is real simple. I just **have to verify** the information you put down. Look's like I have yourdate of birth as.... Is that correct?
- And the address you listed is.... Is that right?

## [ Part 3 – Set the appointment ]

- Perfect. Once again, my name is (yourname).

**I'm the local field underwriter** and they have me dispatched in your area this upcoming Fridayand Saturday. What works better for you morning or afternoon? 9 or 1030?

## [ Part 4 – Confirmation ]

John, grab a pen and paper. Let me know when you're ready.

-My name is (yourfirstname)

-Confirmation code is FFL123

-And what time was our appointment again? (*Make them repeat it because it will solidify the appointment*)

Right, Friday at 1030am.

Now John, any reason why you wouldn't be home at 1030 on Friday?

Should be? Or will be? Because if you're not going to be there, just tell me now so I can put someone else in that slot and move you into the following week.

Sounds good John, look forward to seeing you Friday at 10:30.

# Mortgage Protection Script

Hi, **NAME**?

**HEY NAME**, this is (yourname) calling from the **Mortgage Protection Office**.

-I'm getting back to you about the form you filled out and mailed back to us about a program that pays off your mortgage in case of a death or disability.

**[ WAIT FOR ACKNOWLEDGEMENT ]**

-Perfect. **NAME**, I'm just the agent that is assigned to your case. I need to verify some information with you:

-I have here that your DOB is this **January 1<sup>st</sup>, 1950**?

- [ Great] And you **do/don't** smoke or use any tobacco, correct? [ Ok]

- And the address I have listed for you is **123 Main Street in Chino Hills**?

- Is this your primary residence or rental property? [ Perfect/Awesome/Great]

-What I'm going to do, **NAME**, is I'm going to **put together a few different options** for **you/and your family** so you'll have some choices to pick from.

Pretty much what we do is non-medical. What that means is unlike traditional life insurance, you **DO NOT have to draw blood or pee in a cup**. The only requirement that I have from the insurance carriers is that I **have to verify your ID** and mortgage statement to make sure the names on both are the same.

Does that make sense? [ Normally, they say OH OF COURSE]

I'm going to be dispatched in the Chino Hills area this upcoming Tuesday and Wednesday. What time do you and your spouse get home from work?

**--- WHATEVER TIME THEY SAY ----- Your goal is to fit them in YOUR slot, not for you to fit in their slot**

-Ok. **NAME**, I don't have a 6pm. But I have an opening between 6:30-7:30pm. Outside of an emergency, would there be any reason why you and your spouse wouldn't be home tomorrow between 6:30-7:30pm?

-Ok perfect. Once again, **NAME**, my name is (yourname) from the Mortgage Protection Office. I'll see you this **WEDNESDAY** between **6:30-7:30PM**.

Sounds good, **NAME**, I'll see you soon. Have a good one.

# Old Mortgage Protection Leads Script

Hello Bob,

My name is (your name) and I'm with the Mortgage Protection Office.

You're probably not going to remember this, but around the time you had Purchase or Refinanced Your Home Last [YEAR] with [LENDER INFO, if possible], you filled out a request and sent it to our office about our insurance plan that pays off your home loan in the event of a death or disability.

Our records shows that you where never given the information that you requested so as the supervisor I have reassigned myself to your case to get you the information you want and to verify the information we have.

It looks like you wrote down (go over there dob, height and weight and smoker status with them)

CONTINUE ON as other scripts do...

# Old Internet/Final Expense Leads Script

Hello Bob,

My name is (your name) calling you back from the (Los Angeles) county Benefits Center.

You're probably not going to remember this, but I got [the little green card you mailed in to us / the request you sent to our office online](#)

to get some more information on the updated Final Expense Insurance options.

Our records shows that you where never given the information that you requested so as the supervisor I have reassigned myself to your case to get you the information you want and to verify the information we have.

It looks like you wrote down (go over there dob, height and weight and smoker status with them)

CONTINUE ON as other scripts do...