

A LEAD MORTGAGE SCRIPT

Hello Frank, my name is Andrew I'm giving you a call back from the mortgage protection office regarding the loan you got with (bank). The reason I'm calling is you had filled out a request in the mail to get some information on paying off your home in the event of a death or a disability. You put hear that your birthday is 7/6/1950, is that correct? Great once again my name is Andrew and I'm the field underwriter assigned to get you the information. My job is to verify your health and see which programs you qualify for. The purpose of my call is to see what times you are usually home so I can find a day to put you in my schedule.

It looks like I will be right down the street on Tuesday and I can put you down for six or eight which one of those would work best for you?

Great I look forward to seeing you on Tuesday at six and do you have any big gates or big dogs in the front yard that I need to worry about?

All right well I look forward to meeting you on Tuesday at 6 o'clock have a great day.

FINAL EXPENSE LEAD SCRIPT

Hello Frank my name is Andrew and I'm calling you back from the senior benefit center right here in Victorville California. The reason I'm calling is because you had filled out a request in the mail to get some information on a state regulated insurance program to pay for your final expenses.

You put down here that your birthday is July 6, 1950 and your wife's is July 8 1952 is that correct?

My job as the field underwriter is to verify your health and see what programs you qualify for. The purpose of the call is to find a time that you're usually home so I can find a day to put you in my schedule. Are you both normally home in the morning's, afternoons or evenings?

Perfect, it looks like I will be right down the street Tuesday evening would it be better at six or eight?

OK I have you down at 8 on Tuesday and the address I have is 12345 Anywhere St.

Are there any locked gates or big dogs I need to worry about when I get there?

I look forward to meeting you Tuesday at 8 o'clock and I'll see you then.

Intro to calling an old lead

Hello frank, my name is Andrew and I'm giving you a call back from the mortgage protection department regarding the loan you got with (Bank). I am the supervisor and did a recent audit about a request you had made for mortgage protection after you closed your loan. The reason I'm calling is because our records show that no one got you the information on paying off your home if you were to die or get disabled. Do you recall anyone giving you that information?

Their answer: yes, someone got us that information.

Your response: perfect I'm going to go ahead and get you the updated information on the new 2016 plans that are priced a lot better. It says here you birthdate is ()?

Their answer: no one did

Your response: I apologize we have been overwhelmed, it says here your birthday is ()?

From this point you continue the normal script.