

## Script – Remember Calling is for Booking Appointments Only

- 1) **Greeting** - Hello \_\_\_\_\_ (wait for answer), this is \_\_\_\_\_ field underwriter for \_\_\_\_\_ (Local County) giving you a call back regarding a form you submitted online for life Insurance information where you listed your height as \_\_\_\_\_, your weight as \_\_\_\_\_, and you're a Smoker or Nonsmoker (circle one) Is that correct?
- 2) **Purpose** - Not to waste your time, I am the field underwriter, My job is to simply go over the information you submitted and see if we can determine eligibility.
- 3) **Get the info** – I see you listed your address as \_\_\_\_\_ (is that correct), And your date of birth is \_\_\_\_\_ is that correct? (great) , And are you currently employed, retired, or disabled? (ok), And are you married\* (get spouses name) widow, single, or divorced? (perfect)
- 4) **What do they want** – So that I can better understand what you are looking for, were you looking to just get life insurance coverage or add more coverage to what you already have? (great)
- 5) **Our Programs** – \_\_\_\_\_ (client's name) the way this works, our programs are simplified issued, that means there is No medical, No physical, No blood taken, No urine, and No Exam. They have me come out to verify 3 things, 1) Not bed ridden, 2) Don't require Oxygen to breathe, 3) and to verify your state ID to make sure you're Florida resident.
- 6) **Set the appt** – The office has me dispatched in your area on \_\_\_\_\_, this process takes 10/15 mins. I have 2 available times (list times) \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_. (if married make sure spouse is available)
- 7) **Confirm Info** - confirm address, is this a gated community? Apartment etc.
- 8) **Client write down info** – \_\_\_\_\_ (Client's Name) Grab pen and paper to write down some information. Give name license number and confirmation number: License W136648 Confirmation code 7730