

Everquote Script

Hello, (Name)

My name is Paul and I'm getting back to you about the form you filled out on the internet for information on life insurance protection. (Name) I'm the field underwriter that has been assigned to get the information out to you but just need to verify what you put down.(no pause) You put down your DOB is ____? Ok and you are a smoker/non smoker? You are Married/single?

Perfect my job as your field underwriter is simple. We work with a variety of companies, so my job is to get the different options out to you and verify you are alive and breathing, as the plans are non medical, meaning no blood and no urine.

We are running behind as we have more request then field underwriters so ill put down some notes. Are you working or retired? What time are you typically back in the door from work? Perfect I will have about 5 minutes and can get in you in between appointments either at _____ or _____, what time is better?

Ok I will put you down then and ill have about 15 appointments booked that day, so if you could give me a window between _____ and _____ I know ill probably need it.

Ok perfect and I have your address at _____, is that correct?

Ok perfect.... Well (name) I have you scheduled on _____ at _____ and I look forward to meeting you and helping you, I will see you then. Have a great day.