

Short – Phone Script / Paul McClain

Hello, name

Hi name, my name is _____ I'm getting back to you, from the mortgage protection department, right here in county and the reason of my is call is in regards to the form you had filled out, signed and sent back to the office, for information, on the mortgage life and disability protection. name, I'm the field underwriter assigned to get the information to you, but first I need to verify the information you put down, ok. (wait for response)

You put down...(verify information on the request)... Is all that information correct?

Ok _____ and most families fill out the request to make sure if they die, there home is paid off, so there is no financial hardship, or to ensure if they become disabled, the payments are made. Which was most important to you, or were they both important to you?

Ok perfect. As the field underwriter, I'll put together the different options and programs for you and the way the programs work, you don't have to see a nurse, give blood or pee in a cup, so I just have to verify you are alive and breathing and get the information out to you. Now as for as our schedule we have been behind, so I'll put down some notes. What time are you and spouse both home from work? Ok, I won't have a lot of time but it looks like I can put you down at _____, or _____, what time works best?

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

Ok and I got your address at _____.

Ok Perfect.

And that way I know what options you will best qualify for, have you ever had a heart attack, stroke, or cancer? Any major surgeries in the last ten years? Are you on any Medication? (if yes what is the medication taken for? I.e. blood pressure ect.)

Ok perfect... well name I have you scheduled on _____ at _____ and I look forward to meeting you and helping you. Have a great day.

Older mortgage protection lead scrip

Hello _____, My name is (your name), I'm giving you call back from the National Mortgage Protection center right here in _____ County. And (prospect name), you probably won't remember this, I would be surprised if you did, back when financed your mortgage, you filled out a request, signed it and sent it in to the office. And (prospect name), you wanted information on a plan that pays off your mortgage in the event of a death or makes the payments if you became disabled. And (prospect name), we went through a recent audit and realized you never received the information you requested for you and your family. So as a manger here, I've been reassigned your case to get the information out there for you, I just need to verify the information you put down here to make sure it's still correct ok (prospect name),? Go back to rest of the script on page 1.

You put down...(verify information on the request)... Is all that information correct?

Ok _____ and most families fill out the request to make sure if they die, there home is paid off, so there is no financial hardship, or to ensure if they become disabled, the payments are made. Which was most important to you, or were they both important to you?

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