

Aged Mortgage Script

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.

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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 6pm or 8pm which one of those would work best for you?

Great I look forward to seeing you on Tuesday at 6pm and do you have any big gates or big dogs in the front yard that I need to worry about?

All right, I look forward to meeting you on Tuesday at 6pm. Have a nice day!