



Hey(Client name) can you hear me,
(Wait for answer)

Hey,(Client name) **this is** (Your name), don't worry I am not a telemarketer, I am **just** getting back to you about

(Tele) the call **you** had earlier in the week regarding information on the NEW STATE OF (State) BURIAL AND FINAL EXPENSE PROGRAMS FOR (State) SENIORS, this was the call where they asked you for your favorite color for a call back reference and YOU SAID YOUR FAVORITE COLOR IS (Fav Color)

(FB) the request **you submitted** on Facebook regarding information on the NEW STATE OF (State) BURIAL AND FINAL EXPENSE PROGRAMS FOR (State) SENIORS

(DM) the 3 x 5 card you **filled out by hand and sent back in to us**, now this was a request for **information** on the **new** state of (State) burial and final expense programs for (State) seniors

(Internet) the (Life Insurance, FEX, MP) request **you** submitted online,

(Don't stop) now I **assume** you remember (that conversation / filling this out) and I **just need** to confirm **two pieces** of information here so I can get this in your hands.

It looks like you put down your (AGE/DOB) as, is this still correct?

And I have your physical address as _____, is this correct?

Now were you looking more for information on **burial, cremation** or where you just looking to leave **money behind** for a loved one?

Perfect

Now (Client Name) the reason your request came across **my desk** is I am the local underwriter and they have me dispatched in **your area** over the next couple of days, now I am putting the information together for you **now** and since this will only take about **5-10 minutes** I can **squeeze** you in. Do mornings or afternoons work better for you (Clients Name)? It looks like I have a (Time and Time) on (Day) available which one do you prefer?

I will pencil you in for (Time) (Day), is there an apartment number or gate code I should know of?

Is this your cell phone we are speaking on?

YES: Ok, I will text you the confirmation of our appointment for (Time and Date) please just send a confirmation that you received it.

NO: Ok no problem, grab a pen and paper so you can write this down.
Our appointment is for (Date and Time) and my name is _____. I will be driving a _____ just so you know it's me.

Sounds good (Clients Name), I will see you (Time and Date).