

FINAL EXPENSE PHONE SCRIPT

Hello. Can I please speak with _____?

Hello, this is _____. I'm calling to follow back up with you regarding a call you received a call a few days ago from our Government Approved Senior Care Plan. If you recall, you were pre-approved for a plan that covers final expense, burial coverage, pre-existing conditions, terminal illnesses, nursing home care, and home health costs. The representative told you that I would be calling you back.

I'm calling to schedule a time to meet with you to give you an overview of what your options are which will only take around 20 minutes. My company has me scheduled to be in your area on _____ and _____. Which day is best for you?

Now do you prefer morning or evening?

Morning: Would __:00 be ok?

Evening: What is evening to you? Sometime earlier around 5:00 or later around 7:00? Would _____ be OK?

Will your spouse be present? (If no – find another day/time when both are available)

I have your address as _____. Is that correct?

I have a GPS system but sometime those things have me doing u-turns more than anything else. Could you please give me directions to your house from a major intersection?

OK, will your house number be on the mailbox or your house?

Well if you want to grab a piece of paper and pen to write this down, my name is Wendell and I will be in a white car so when I pull into your driveway you know it is me.

An what time did we say?

OK, well you have a good night and I will see you (and your wife) _____ on _____ at _____:00.

USE THIS WHEN YOUR SCHEDULE IS FILLING UP

I've got some time available on Monday or Tuesday (pick days you have available). Which of those days are better for me to go over this information? (Never go past 48 hours).

I have some time at 1:00 or 5:00. Which one works for you (pick times you have available).