

## FINAL EXPENSE PHONE SCRIPT – Setting Appointments For Yourself

Hi. May I please speak with \_\_\_\_\_ (prospect name)?

Hi \_\_\_\_ (prospect name). My name is \_\_\_\_\_ and I'm calling to follow back up with you regarding a call you received from \_\_\_\_ (name off of lead) the other day. Ya, she was from our Government Approved Senior Care Plan. You remember that right?

OK, Now I'm certain she let you know that you were pre-approved for a plan that covers final expense, burial coverage, pre-existing conditions, terminal illnesses, nursing home care, home health care. I'm certain that \_\_\_\_ (name off lead) would let you know Id be calling you back correct?

OK great. Well I want to do real quick \_\_\_\_\_ (prospect name) is to schedule a time to meet with you. That will give me a chance to give you an overview of what your options are. It should only take about 15-20 minutes.

What's best for you? Mornings or afternoons?

Alright, \_\_\_\_\_ (prospect name).

And your \_\_\_\_\_ (husband/wife) will be there as correct? Alright great.

Well do me a favor \_\_\_\_\_(prospect name), grab a pen and paper. I want you to write down my name so you know who is coming, again my name is \_\_\_\_\_.

And just so you know who is pulling up in your driveway, I will be coming in a \_\_\_\_\_. (color and make of car).

Alright \_\_\_\_ (prospect name)? Well I look forward to meeting with you. You take care and have a great day.

## PHONE SCRIPT – Setting Appointments For Someone Else

Hi. May I please speak with \_\_\_\_\_(prospect name)?

Hi \_\_\_\_ (prospect name). My name is \_\_\_\_\_ and I'm calling to follow back up with you regarding a call you received from \_\_\_\_ (name off of leads) the other day. Ya, she was from our Government Approved Senior Care Plan. You remember that right?

OK, Now I'm certain \_\_\_\_ (he/she) let you know that you were pre-approved for a plan that covers final expense, burial coverage, pre-existing conditions, terminal illnesses, nursing home care, home health care. I'm certain that \_\_\_\_ (he/she) would let you know that \_\_\_\_\_ (name of agent) would be calling you back correct?

OK great. Well I schedule appointment for \_\_\_\_\_ (name of agent) and what I want to do real quick \_\_\_\_ (prospect name) is to schedule a time for you to meet with \_\_\_\_ (name of agent). That will give \_\_\_\_ (him/her) him a chance to give you an overview of what your options are. It should only take about 15-20 minutes.

What's best for you? Mornings or afternoons?

Allright, \_\_\_\_\_ (prospect name).

And your \_\_\_\_ (husband/wife) will be there as correct? Alright great.

Well do me a favor \_\_\_\_\_ (name), grab a pen and paper. I want you to write down \_\_\_\_\_ (his/her) so you know who is coming, again \_\_\_\_\_ (his/her) name is \_\_\_\_ (agent name).

And just so you know who is pulling up in your driveway, \_\_\_\_ (he/she) will be coming in a \_\_\_\_\_. (color and make of car).

Alright \_\_\_\_ (prospect name)? Thank you for your time and have a great day.