

Facebook Final Expense Phone Script 2

Hi (Client Name), This is _____ I'm getting back to you regarding the post you responded to for information about our life insurance programs, which covers your burial or cremation and final expenses.

(Client Name), I just need to authenticate the call - You put down your favorite hobby as _____. Do you remember that? *(wait for a response)* Great!

(Client Name), my job is to sit down with you to see what programs you might qualify for.

(Client Name), you put down your date of birth as _____. Is that correct?

Are you still working or retired?

(Note: this will help you determine when to fit them in your schedule)

(Client Name), the company has me scheduled for your area on (day you are in the field) meeting with about 12 other people, so I won't have a lot of time, but I can squeeze you in between appointments on (day_____). I have (time_____) or (time_____). Which time works best for you?

(Note: use the times that work for you as an agent and control your schedule)

Ok. I'll put you down for ____ (day) at _____ (time). Because we have full schedule, is there any reason why you wouldn't be home at that time and you know for sure it works for you? Ok.

(Client Name), are there any medical concerns I need to be aware of, like heart issues, diabetes, COPD? Ok.

Will GPS have any issues finding your place? Ok.

(Client Name), can you do me a favor and grab a pen and paper? I want to give you some info to jot down....

First, jot my name down _____ and the time I'm going to be at your place which is _____ @ _____

Do you have a spouse or partner? Can you do me a favor and let them know what time I'll be dropping by to show you what programs you qualify for.

Have a great day and I'll see you on _____ @ _____