

## HAYDEN HILL'S FINAL EXPENSE PHONE SCRIPT

Hey, \_\_\_\_\_ (prospects name)? Hey. \_\_\_\_\_ (prospects name) this is \_\_\_\_\_ (your name) from the benefits center at Dallas county. Just giving you a call back to let you know that we did receive your request for that life insurance coverage. I'm just calling to verify here, you are at (address). Is that correct? Ok great, and your date of birth is (D.O.B) is this correct? Ok great.

Now when you request this, were you looking to cover just yourself or did you have a spouse or child in mind as well? Ok awesome

Again \_\_\_\_\_ (prospects name) my name is \_\_\_\_\_ I'm the medical field underwriter here at Dallas County assigned to get the information that you requested. Now just how you read <- (past tense) because it is no-medical, there is no physical exam nor blood. My job is just to get out there, ask you a couple of questions, and then from there, shop around and find you the best program based on your situation ok. It will take just 10-15 mins.

Now are you working or are you retired? Ok great. I'm going to be in your area on \_\_\_\_\_ What time do you get back home from work? Or are you a morning person or an afternoon person? Ok, So can I squeeze you in at \_\_\_\_\_ or \_\_\_\_\_? Which one works best for you?

Alright perfect, go ahead and grab a sheet of paper and tell me when you are ready. So my name is (your name) our appointment date and time is (appointment date and time) and my license number is (License #)

**If there is no apartment number, or it is a house.** Is this a house or apartment?

Any big gates or dogs?

# on the house is it on the mailbox/curb?

**If it is an apartment.**

Is there a gate code? Apt #? Double confirm it.

Is there a visitor's parking lot?

I will be pulling up with a (your car) I have us down on (date) at what time again? (time) perfect. I look forward to protecting you on (Date, time) See you on (Day)