Hello, \_\_\_\_\_ [prospect’s name]? Hi, \_\_\_\_ [prospect’s name], this is \_\_\_\_ [your name] and I am giving you a call regarding the request you made online for life insurance. I’m the field underwriter assigned to your case. I just need to verify a bit of information and I’ll have you right off the phone.

Now, I have your address listed as \_\_\_\_\_\_\_\_ [read off address]? Great.

And you put down your date of birth as \_\_\_\_\_\_\_? And your wife’s as\_\_\_\_\_\_? Great.

Now, I get quite a few of these responses per day so I need to do a little screening health-wise…. are you and your wife in good health? Great!

In the last 7 years have you been treated for any of the following:

Cancer, heart attack, stroke, heart failure, COPD, diabetes requiring Insulin? Okay, great. (Or, “no problem” if they list one)

How about the small stuff like high blood pressure, cholesterol, anxiety/depression, thyroid? Ok, great! (or, “no problem” if they list one)

So, what we need to do now is set up 15-20 minutes at the most to drop off this information, answer all of your questions of course, and if you see something you like, great! If not, no problem! Fair enough?

I’m going to be in your area Monday and Tuesday this week. It looks like I have something open on Monday at \_\_\_ or Tuesday at \_\_\_\_. Which one of those times works best for you?

Now \_\_\_\_\_ [prospect’s name] the address to your house, the numbers, where will I find those? On the house, the mailbox, or the curb? Awesome, I’m going to send you a text message with all of my contact information and the day and time that we set so if there’s any issue just shoot me a text and we’ll recoordinate our schedules for a different time. Look for that in about 2 minutes.

No news is good news, so if I don’t hear from you I look forward to seeing you and \_\_\_\_ on \_\_\_\_day and time!