FINAL EXPENSE

INTRODUCTION

Client answers: (Client name)?. (wait for answer)

This is _____, with the Benefits Office right here in (County). I know you are busy (name), I was just getting back to you about that form you filled out online about the state regulated final expense programs. It's where you put your birthday as _____. That's you, right?

Perfect, (Client name) This call is just 60 seconds to confirm a couple details.
Are you still at (address)?

FIGURE OUT THEIR SCHEDULE

(Client name) are you working disabled or retired?

- If working: What time do you typically get home from work?
- If retired or disabled: Do you have any doctors appointments on (enter day)?

Ok and are you married or single?

- If married: And are they currently working, retired or on disability?

I'm the field underwriter assigned to see what coverage you'd be eligible for. They just send me out there for 10-15 minutes to see if we can help you out.

TELL THEM YOU'RE COMING OVER

I have about 10 other families I need to see in your area (enter day), I already have a (enter time) booked, but what I'll do is put you down for a (enter time) for about 10-15 minutes.

TIE DOWN THE APPOINTMENT – GET THEM TO VISUALIZE YOU COMING OVER

The (enter street address), is there an apartment number?
gate code? visible from the street?
what color is the house?
And will the numbers be on the driveway or the front door?

Great, can you do me a favor and grab a pen and paper so you can take down my information?

- Provide:
  - Name
  - Appointment date & time. Give an hour window. (So if they appointment is at 9a, say I'll be there between 830-930a)
  - Confirmation Code. Mine is CT21 (make one up, sounds more official)

Awesome. I'll be driving a (enter car type) so when you see that pull up, you know you have the right person.
One last thing, _____ are you good at keeping appointments? (wait for answer)
Me too. See you on (enter day) between (enter time) and (enter time).