

**Use a tone as if you are the expert, because you are. Level tone, professional.**

## MORTGAGE PROTECTION

### **INTRODUCTION**

Client answers: (Client name)?... Hey (Client name) this is \_\_\_\_\_, with the Mortgage Protection Office right here in (County). I was just getting back to you about that form you had filled in online about the state regulated life insurance programs. It's where you put your birthday as \_\_\_\_\_. That's you, right?

Perfect, (Client name) I'm just the field underwriter assigned to get the information to you and 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.

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 off of 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?

### **TELL THEM YOU'RE COMING OVER**

Ok, I have about 10 other families I need to see (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 to get this information back to you.

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

The (enter street address), 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? Me too. See you on (enter day) between (enter time) and (enter time).