

Mortgage Protection Script

Hi, **NAME**?

HEY NAME, this is Steven calling from the **Mortgage Protection Office**.

I'm getting back to you about the form you filled out and mailed back to us about a program that pays off your mortgage in case of a death or disability.

[WAIT FOR ACKNOWLEDGEMENT]

Perfect. **NAME**, I'm just the agent that is assigned to your case. I need to verify some information with you.

I have here that your DOB is this **January 1st, 1950**? [Great]

And you **do/don't** smoke or use any tobacco, correct? [Ok]

And the address I have listed for you is **123 Main Street in Chino Hills**?

Is this your primary residence or rental property? [Perfect/Awesome/Great]

What I'm going to do, **NAME**, is I'm going to put together a few different options for **you/and your family** so you'll have some choices to pick from.

Pretty much what we do is non-medical. What that means is unlike traditional life insurance, you DO NOT have to draw blood or pee in a cup. The only requirement that I have from the insurance carriers is that I have to verify your ID and mortgage statement to make sure the names on both are the same.

Does that make sense? [Normally, they say OH OF COURSE]

I'm going to be dispatched in the Chino Hills area this upcoming Tuesday and Wednesday.

What time do you and your spouse get home from work?

[They said 6pm]

--- WHATEVER TIME THEY SAY --- Your goal is to fit them in YOUR slot, not for you to fit in their slot

Ok. **NAME**, I don't have a 6pm. But I have an opening between 6:30-7:30pm. Outside of an emergency, would there be any reason why you and your spouse wouldn't be home tomorrow between 6:30-7:30pm?

Ok perfect. Once again, **NAME**, my name is Steven from the Mortgage Protection Office. I'll see you this **WEDNESDAY** between **6:30-7:30PM**.

Sounds good, **NAME**, I'll see you soon. Have a good one.