(Client Name), this is _____ getting back to you in regards to the postcard you filled out, looking for something to pay off house when you pass away. I'm just the medical underwriter for _____ county. I've been assigned to get this informational packet out to you, I just need to confirm the delivery address.
-No Pause-
I've got _____ as the delivery address, is that correct?

And I've got a date of birth as _____, is that correct?

Okay perfect. I'll have you off the phone here in 30 seconds.

Most people fill these out because they want to make sure that when they pass away the house paid off or if they become sick or disabled, the payments continue to be made. Is that what you were looking for or something different? Perfect.

And are you a smoker/non smoker? Single/married/widowed/divorced? Are you working/retired/disabled? And do you have any adult children? Perfect

So the good news is (Client Name) there's about a dozen options you can qualify for, and they're all non-medical, meaning no blood, no urine, no needles, no doctors appointments
All that THEY do is THEY just make me, the medical field underwriter, come sit down with you for about 10-15 mins to make sure #1) that you are who you say you are, that nobody is trying to get insurance in your name, make sure there is no fraud being committed, and confirm you didn't escape from prison or something, and #2) just to make sure you're not hospitalized or bedridden, or hooked up to an oxygen tank full time.

Now in regards to our schedule, we've actually been super far behind, so I'm actually a manager here that they have helping out. They are gonna have us dispatched in the area delivering like 30 of these packets a day so I don't have a lot of time, only 10-15 minutes for you.

It looks like they are going to have me dispatched in your area tomorrow and _____.

Disabled/Retired
Do you have any doctors appointments tomorrow or _____?

Working
What time do you typically get back in the door from work Monday-Friday?

Okay perfect, it looks like they are going to have me out there on _____, I've got a ___:15 or a ____:45, which one works better for you?

Okay perfect, I've got you down here for ____am/pm.

The address I have here is _____. Is that a house or an apartment?
If I've got a GPS, is that pretty easy to find?
In case I get lost, what color is the house?
Any big dogs or gates I'm going to have to jump over to get to the front door?
And are the numbers pretty easy to find on the house or the mailbox?

Okay great, I've got you down here for ____am/pm….Can you do me a quick favor and grab a pen and paper, I just need you to write down our my state license number so you can verify that I am who I say I am.

First write down my name, it's (Your First Name), write down our appointment time, it's (Appointment date and time), and my state license number is _____.
And this is regarding your request for the life insurance.

Okay perfect (Client Name), go ahead and add this to your calendar and I'll add it to mine

Just so you know I'll be driving a _____ (car). I've got _____(hair). I'll be wearing a name tag, so if you see me coming up the driveway, you can put the shotgun away, okay?

Perfect. I look forward to meeting you and helping you.

If you're not sure if they will be there, add this at the end

One last thing_____, I'll be coming from a ways away, and if you weren't there, it would really throw a monkey wrench in my schedule. Now I understand serious emergencies happen, but barring an emergency, is there any reason you wouldn't be there at (Appointment date and time). Okay great, see you then!

I look forward to meeting you and helping you.