

Hello, thank you for calling today! This is _AGENT NAME_ on a recorded line, I'm going to be your licensed agent, who do I have the pleasure of speaking with today please?

Before we dive in here, can I reach back out to you at this number xxx-xxx-xxxx if we get disconnected?

I just want to make sure I have the time zone right, what state are you in?

Wonderful and my system says you're 32? Is that right? Or how young are you please?

Great! Are you looking for quotes just for yourself or a spouse as well?

Perfect! Just so we're on the same page _CLIENT_ do you have any questions about how final expense insurance works? Or have you ever heard of insurance helping pay for the final expenses of someone you knew?

Have you ever purchased final expense insurance before, or do you have any currently in place?

(Ask only if they say YES to having insurance. Skip this if they do not have insurance.)

Perfect! How long have you had it?

*What type of policy?

*How much coverage?

*Great! How did you choose that amount back then?

*What're they taking out of your bank for that?

Oh wow, I was expecting you to be paying less for that amount of coverage! *Do you know what company you have it with?

So we're just looking to improve your situation, are you more interested in adding more, saving money or you're actually overpaying so much you can probably add more AND save money.

Wonderful, so I'll make this as quick and easy for you as possible, talk to me about what you're looking

for, let's take it from the top, who are you worried about financially when you pass away?

*Okay, got it, so we're doing this for _BENEFICIARY_. What are you worried about them being able to afford for when you pass away?

Great! So you have COVERAGE _REASON_, so if I can help you fix that, that's the goal, did I get that right?

and you're worried about _BENEFICIARY_ affording

Perfect to make sure the policy is appropriate what do you think it'll cost to take care of _REASON_?

That'll be easy for me to help you with, you got to the right person! Just a few questions so we get it right. Have you ever worked with an independent final expense agent before?