

Policyholder Phone Script

VOICEMAIL:

Hey **NAME**, this is **YOUR NAME**. I am a policy service manager with American Income Life, your life insurance company. Your service files were updated for 2026, and we need to speak with you briefly over the phone. This is very important and time sensitive, I need you to give me a call back. There's a new claim form we need to mail out, so I need to verify the mailing address with you briefly.

We're doing this over a call, we are not sending any agents to the home this year. If I don't hear back, I will try following up with you later in the day.

Give me a call back as soon as possible, **PHONE #**. Thank you

SCRIPT:

Hey, **NAME**?? Glad we got in touch with you!

This is **YOUR NAME**. I am a policy service manager with American Income Life, your life insurance company. We have been trying to reach you for a few weeks now.

The reason for the call is, your service files were recently updated. There is a new claims form for your policies, riders have been added, and we need to update some information on your account through a quick call. Since we will be mailing paperwork out, I need to first verify your mailing address. Is **ADDRESS** still correct? Perfect.

Do you **(AND SPOUSE)** still have your blue service folder with all your policy information? Perfect. We will be replacing some paperwork there, and will also do a quick review to make sure you remember exactly what you have & where your money is going.

V1. PHONE CALL APPT

Back in the day, we serviced the members personally in their home. Nowadays, everything is done through a quick phone call with each member. So all we need to do is schedule a brief call with you **(AND SPOUSE)**.

V2. ZOOM APPT

Back in the day, we serviced the members personally in their home. Nowadays, everything is done virtually through Zoom. It's a lot quicker and more efficient for everyone. Have you ever used it before? **(if no, give a easy/simple explanation. do not over complicate it)**

The hardest part about my job is coordinating my schedule with everyone, because they have me seeing 8-10 people each day. So, what time do you **(AND SPOUSE)** normally get home from work? **(or are you retired?)**

Perfect! I am pretty booked up right now, but let me see what I can do for you...

****ALWAYS SHOOT FOR SAME DAY/ INSTA-SITS!****

I can squeeze you guys in today around **TIME** or **TIME**... Which would work best for you and **SPOUSE**? Okay great.

Just to confirm I have your email as _____. I'm going to send you the paperwork for your policy for when we connect later.

Do me a favor, grab a pen and paper. I have some important information that I need you to write down. Let me know when you're ready.

- Write down my name: **(SPELL YOUR NAME)**,
- our appointment date/time: **DATE/TIME**,
- and my number: **PHONE NUMBER**.
- Lastly, write down **POLICY NUMBER**.

You have all that? Perfect!

Now **NAME**, is there any reason you can think of why **TIME** wouldn't work for you **(AND SPOUSE)**? Okay great! There are so many of you guys and only one of me. I service members every hour, on the hour. By setting this time aside for you, I am taking it away from another family. All I ask - if an emergency comes up and you cannot make this meeting - that you let me know **AHEAD OF TIME** so I can delegate this time slot to another family. Can you promise that? Perfect! Keep an eye out for a reminder text for our meeting!

I look forward to speaking with you **(AND SPOUSE)** at **TIME**! Have a great day.