

**New Lead:**

**(Client Name), this is \_\_\_\_\_ getting back to you in regards to the inquiry that was sent into my office looking for more information on the life insurance program for \_\_\_\_\_ county, your phone probably started blowing up with spam calls right after, I'm the manager calling to apologize you got some many phone calls, I'm the local guy that's been assigned to your case to get this informational packet out to you. I just need to confirm the delivery address.**

**-No Pause-**

**I've got an old or current address of \_\_\_\_\_. Is that current?**

**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 there are no burdens left behind like burial or cremation, or maybe they just want to leave some money behind to their family.

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. That's not you, right?

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 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.