NEW SCRIPT 5-1-19

Hello, is\_\_\_\_\_\_\_\_\_(First Name) available.

Hello\_\_\_\_\_\_\_\_\_(First Name) this is\_\_\_\_\_\_(CSR) calling to verify your address so we can get you that Wal-Mart gift card you will receive for sending us back that postcard regarding new burial and final expense plans in \_\_\_\_\_(State)!

Looks like you also wrote down your birthday as \_\_\_\_\_(BDay) correct?

How young does that make you now?\_\_(age) years young, right! (Laugh)

Ok, let me also verify the address you put down\_\_\_\_\_\_.

Again, this postcard was to see if you qualify for new burial or final expense insurance plans in \_\_\_\_\_\_(state) for seniors on a low or fixed income.

Now, was this information just for you or was it for you and someone else?

\_\_\_\_\_\_\_\_(First Name) Let me verify the rest of the information that you filled out on this card.

Again, DOB or Age? (this makes you\_\_\_\_\_years young?) (Laugh and say you sound 15 years younger)

* Street Address
* City and State
* Zip

And it looks like you checked the box to see if you qualify for \_\_\_\_\_\_\_of coverage Fantastic!

\_\_\_\_\_\_\_(Name) Let me ask you 4 questions to see if we are able to get you the correct information.

1. In the last 12 months, any major surgeries or have you been turned down for insurance?
2. Do you use oxygen fulltime? (Not set)
3. Do you have Alzheimer’s or currently have cancer?
4. Have you had a heart attack or stroke in the last 12 months?
5. Would you say your retirement portfolio is under or over 100K? (if under: approx)

(if asked why, to see if you qualify for certain plans)

(If over 80 and answer ANY YES, DO NOT SET)

Fantastic, Ms./Mr.\_\_\_\_\_\_(client), sounds like you may be entitled to this information, that’s great!! That’s better than most people I talk to!

As you probably remember from the card, Social Security only pays a $255 death benefit upon passing! That won’t even cover the cost of flowers, will it!! LOL (LAUGH)

As a courtesy to you, one of our licensed senior specialists will be in your neighborhood tomorrow getting this information to a few of your friends in the neighborhood, would the MORNING OR AFTERNOON tomorrow be better to catch you for about 15-20- minutes to see if you qualify and we will leave the info in case it’s something you want to do in the future. Are you a morning or afternoon person?

OK great, I have a \_\_\_\_\_\_\_\_ o’clock or a \_\_\_\_\_\_\_\_ o’clock available. Which one works best for you?

Now,\_\_\_\_\_\_\_\_\_\_(agent) will be bringing a copy of the postcard you mailed in, you will remember your handwriting won’t you! LOL

Can you please grab a piece of paper and pen to write down the CONFIRMATION NUMBER to give the senior specialist when he/she arrives. Your confirmation number is \_\_\_\_\_\_\_and your senior specialist’s name is\_\_\_\_\_\_\_. Now can you help us with one more security item?

Can\_\_\_\_\_\_\_\_(agent’s name) your licensed senior specialist, use your phone when he/she arrives to make a safety check-in call so we know he/she arrived safe and on time to your home!

One more thing I almost forgot Ms./Mr.\_\_\_\_\_\_\_(client), there is a discount on this information if you bank local in the \_\_\_\_\_\_\_(same city they live or state), do you bank local in \_\_\_\_\_\_(city or state) to receive this discounted information?

(If over the age of 65)

\_\_\_\_\_\_(First Name) I’m assuming that at the age of\_\_\_\_\_(age) years young, that you are on Medicare, correct?

Fantastic, it’s about time that the government took care of something after \_\_\_\_\_\_(age) years of giving them your money, right! LOL

Great! What company did you choose to cover the 20% that Medicare does not? That’s a GREAT Plan, Congratulations! Do you pay an out of pocket premium monthly? (If yes) What letter plan do you have?

Now so that \_\_\_\_\_\_(agent) brings the correct information, how much life or burial coverage do you currently have?

Ok, wonderful Ms./Mr.\_\_\_\_\_\_\_\_\_, we will see you tomorrow at \_\_\_\_\_\_\_\_\_(time) to get this information to you and then if you qualify, \_\_\_\_\_\_\_\_\_(agent) will follow up with you in about a few weeks!

Are you or your spouse a Veteran? (If yes) thanks for serving our country!

Would you be interested in receiving information on how to qualify for free Home Health Care? (If yes) What is your favorite color?

What’s your email address?

If you give me one moment I’m going to have my supervisor come on the line to verify your confirmation number.