

# In-Home Final Expense Phone Blueprint

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## INTRODUCTION

Hello **Client Name**? Hi, this is **Agent Name** from senior benefits. I was just contacting you in regard to the request form you sent in about your new **California** 2022 benefit update. It was the form you filled out with your date of birth and signed. Do you remember sending that back to us? **(Wait for response)**

Great! I'm calling because I want to make sure your free information packet gets delivered to you. I just need to verify your address to make sure we get that over to you, are you at **123 Abc St. Anywhere, USA**, is that correct? **(Wait for response)**

## SET APPOINTMENT

Great! So it looks like there are some seniors in your area that are also receiving this free information packet this **Tuesday and Wednesday**. What day would work better for you, **Tuesday or Wednesday**? **(Wait for response)**

And do mornings or afternoons work better for you? **(Wait for response)**

Perfect! I have a **10:00 am or 11:00 am**, which works better for you? **(Wait for response)**

## TIE-DOWN

Sounds great! **Client Name**, would you mind grabbing a pen and paper so you can write down some important information?

Are you ready? First, I need you to write down my name, **Agent Name**, and the date and time I will be there, **Tuesday at 10:00 am**. Lastly, because this is a state-regulated senior program, I will just need you to have a photo ID so we can verify you are over 50 years of age. So when I stop by, I will bring your free information packet, the form you sent back to us, and a copy of my state license and credentials.

Thanks so much, **Client Name**, for your time and I look forward to seeing you this **Tuesday at 10:00 am**. Have a great day, bye-bye.