

[CALL in the Morning, Afternoon, and Evening until you get in touch with them]

[150+ Dials per Day]

[TRIPLE DIAL]

Hey [Client's Name], how is your day going so far?

Hi, this is [Your Name]...I'm not quite sure if you could help me out?... I have here the mortgage deed for property over there at [Address] in [City] in [County] county. You are still the property owner here, right?

OK. So...you might vaguely recall that when you closed on your loan, you indicated some interest in paying off your loan, if...God forbid, you were to become sick, disabled or pass away. This was part of your closing paperwork and then we followed up with a bunch of mailers. Do you recall something like that?

That's exactly why I'm calling. I was assigned to follow up on your file to make sure you receive this important information. It looks like this wasn't taken care of at the time, and I just need to verify a few things real quick, so we can get the best options out to you.

So, it looks you inquired for this plan right around [Original Lead Date] when you closed on your mortgage, and your loan amount at the closing was around [Mortgage Amount]. Does that sound about right?

Cool.. So, what do you know about mortgage protection insurance?

OK. Think of this mortgage protection insurance as a safety net for your home. It's simple...it pays off your mortgage in case of death, disability or critical illness, like cancer, heart attack or stroke. So, your family doesn't lose the home if something bad happens. **Is this something that would be important to you and your family?**

[If YES, proceed. If NO, Next!] By the way. Is there anyone else going to help you make this decision...like a spouse...or a partner?"

[IF there is a spouse or a partner, make sure they both can attend the appointment. And repeat spouse's or partner's name] Just to double-check. There's no reason you'd miss this call [Confirm the appointment time], right? Can I count on you to make it?"

Last thing before you go, can you do me a favor? Can you just grab a pen and paper? I need to give you the confirmation number. Let me know when you are ready, please.

Perfect! Again, my name is [Agent Name], and we are scheduled to go over mortgage protection at [Confirm appointment time] and your confirmation number is 22 91 44. Do I need to repeat any of that info?"

"Great! It's all set then. Can you do me a favor? Can you put that note on your fridge or on your calendar? I don't want you to miss it. I'll also text you an appointment reminder too. Sounds good?"

Fantastic! I hope you have an awesome rest of your day! Take care now. Bye bye