

[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?

My name is [Your Name], I'm just giving you a quick call about your mortgage with [Lender Name] for the amount of [Loan Amount] over there at [Address] in [City].

I'm reaching out to you as a follow-up to the information we sent you in the mail regarding mortgage protection insurance. This program pays off your home in case of death or disability. Have you had a chance to look over the materials we sent?

[If "YES"] That's exactly why I'm calling. I've been assigned to help you take care of this. It takes 10-15 minutes on the phone. Is now a good time, or do we need to schedule a different time later today or tomorrow? [if they want to schedule, "do you prefer morning, afternoon or evening?"]

[If "NO"] That's exactly why I'm calling. I've been assigned to go over this important information with you. So, what do you know about mortgage protection right now?

It's simple. It pays off your mortgage in case of death or critical illness, like cancer, heart attack, or stroke, so your family doesn't lose the home if something tragic happens. It only takes 10-15 min on the phone to take care of this. Is this something that would be important to you and your family?

[If "YES"], proceed with setting the appointment.

[If "NO"]. OK. I will update your file accordingly. Have a great day. [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