

## **100** NEW Mortgage Protection Appointment Setter Script

### **✓ Opening:**

**“Is this [First Name]?”**

*(Pause — do not speak until they respond)*

“Hi [First Name], this is [Your Name] with the **Mortgage Protection Service Team**.  
I’m calling about your **loan with [Lender Name]**, over at **[Address]** in **[City]**.”

“I was hoping you could help me with something real quick...”

*(Pause — short beat)*

“We’ve been reviewing your file this week, and you should’ve received a few mailers about **how to protect your home in the event of death, disability, or a serious illness like cancer** — but it looks like that hasn’t been set up yet.”

“Is this still something that’s important to you... to **make sure your family is protected and the mortgage is paid off** if something unexpected happens?”

### **✓ If they say Yes (or even “Depends” or “I guess”):**

“Great — and just so you know, your file’s been flagged for a **priority review**, which means we can go over the best available options in about **10 minutes**, and make sure you’re **not overpaying for coverage**.”

“Just to make sure we match you with the right licensed specialist, can I quickly confirm a couple of things?”

– Is your address still **[Address, City & State]**?

– And the loan amount was around **[Loan Amount]**, right?

*(Confirm)*

“Perfect. The good news is — this review service is completely free, and it includes:

- 1) A top-rated, independent broker in your area** who helps families just like yours every day
- 2) Access to over 20 trusted insurance companies**, so you can find the most competitive rates

3 Coverage options customized to your budget and health — **with no medical exam required**

**“Would it make sense to take a few minutes and see what your options might look like?”**

### **If they say YES:**

“Awesome — I’ll get you scheduled. No pressure at all, just a quick call to go over everything so you can make the best decision for your family. Sound good?”

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### **Scheduling & Confirmation Flow:**

“Perfect! Would **morning, afternoon, or evening** work better for you?”  
*(Book on the calendar and lock it in)*

“What would be the best **email** to send your confirmation and your licensed agent’s credentials?”

“Great — just to confirm:  
I’ve scheduled you for **[Day] at [Time]**. Please jot that down so it’s blocked off.”

“When you speak with the specialist, they may ask for some **basic info** like your driver’s license, any medications, and how you’d like to handle payment — just so you’re prepared.”

“And if anyone else helps make decisions — like a spouse or partner — make sure they’re available too, okay?”

“What time did I say again?” *(Wait for them to repeat it back)*

“Perfect — we’re looking forward to helping you protect your mortgage at **[Time]!**”