



VIRTUAL SALES TRAINING

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MORTGAGE PROTECTION TELESales PHONE SCRIPT - 1

(talk monotone, 3x dial, 3 times a day)

Hey, ____, I'm __ just calling about the mortgage protection information you requested, regarding your ____ Loan. This is that mailer you filled out and sent back to us, that talked about paying off your house in case of death or illness.

I Just need to confirm: Loan Amount & Age. Do we have that right?

Ok great. Now we can't go over it right now, because we have other appointments scheduled.

What time do you typically get home from work?

So what triggered you to fill out the form and mail it back? What was your concern? Why did you want to look into this?

Thought I had too: It's not required. But I am the medical field underwriter assigned to you to go over plans **you qualify for** to pay off your house in case of death, illness, or disability. There are several different plans & options, and you can pick the plan that fits your budget. That being said, and it's ok either way, **is this protection you wanted on your house or not?**

Let me see what openings I have left... **Well Looks like I have ____, and ____ available. What time works for you?**

Is there any reason you can think of why you wouldn't be home at that time. Like could you be driving? Or stop at the grocery store? Ok you are required to be home, so wanted to make sure.

IF ONE NAME ON REQUEST: I see only one name on the form you sent back. And who would the house go to when you pass away ____. **Do they live at the house?**

(If Yes) Ok well you are **both required to be home at that time**. Does that time work for both of you? Great. Can you tell ____ about the appointment, when we are done here?

IF TWO NAME ON REQUEST: I see ____ on the form you sent back, **They are required to be there as well. Will they be home at that time?**

Ok I just need you to grab a pen for the confirmation #. Let me know when you're ready.

(Confirmation code), *****Receive a phone call around ____ & __, give yourself 45min,** Day, Date, Your Name. I'll text you my credentials after this call so you can look him up and verify him.

*****Can you read that back** to me to make sure we have it all right?

*****Can you add a reminder (fridge, calendar, phone) so you don't forget?** We are looking forward to working with you & helping your family on DAY expect to receive a call between time & time. (**SEND TEXT ID!!)