MORGAGE PROTECTION ZOOM SCRIPT - 3

Hi _____, this is [Your Name]. I am getting back to you about the Mortgage Protection response card that you filled out and submitted for your mortgage through _____ bank/lender.

This is the kind of coverage that if anything were to happen to you or your spouse, your mortgage would be covered. That is what you guys were looking for, correct?

Okay, perfect. I just have a couple of questions for you and then I'll get you off the phone.

I have your DOB as _____ and you spouse's as _____. Is that accurate?
I have your mortgage amount as $_____. Is that correct?
Was it a home purchase or a refinance? Perfect.
**If Refi, ask - Was it because you wanted to save some money each month? Okay, great.
What's your monthly mortgage payment?
And for 30 years, yes? Okay, perfect.

I get a ton of these response cards in every week, so I'm going to ask you a couple of health questions.

When it comes to major medical conditions for you and your spouse, do either one of you take any major medications for like cancer, stroke, heart attack, diabetes that require insulin… anything like that? Okay, thank you.
What about small stuff like hyperthyroidism, high blood pressure, high blood pressure? Anything of that nature? Perfect.

So, _____ (Client Name) what I do is basically take the information that you just gave me and I'm going to bounce it out across the system. I have all kinds of carriers that I work with. I'm going to find out what they say and weed through the best offers so that we can find you the best possible solution that would get you and _____ (spouse's name) protected.

I'm going to schedule a time to go over the options with you and if I can help you, awesome - I'll be your advisor moving forward. If not, no worries. Sound fair?

Are you and _____ (Spouse's name) still working? What time do you both usually walk through the door? Okay, great.

I can schedule a Zoom meeting for _____ (Time) or _____ (Time) tomorrow. Which works better for you?

I have your email as _____. Is that correct?
Awesome, I'll send you a link and look forward to helping you tomorrow at _____ (Time). Talk to you soon.