

# FINAL EXPENSE PHONE PRESENTATION

Agent: Hi \_\_\_\_\_, my name is \_\_\_\_\_ and I was giving you a quick call because you spoke with someone (name of TM if you have it) from our office the other day about burial insurance and I was calling to verify the information that we have. \_\_\_\_\_, is this coverage just for you or you and someone else? **(This is where we usually find out if there is a significant other)**

Prospect: Just me. **(if for someone else too, get info)**

Agent: It says here that you are (age), but they forgot to get your date of birth. What's your date of birth?

Prospect: \_\_/\_\_/\_\_

Agent: Ok. \_\_\_\_\_, are you a smoker or a non-smoker?

Prospect: No

Agent: Great! \_\_\_\_\_, have you give any thought to how much insurance you need to make sure your family won't experience a financial burden?

Prospect: \$\_\_\_\_\_

Agent: Great \_\_\_\_\_, One of the reasons for my call is I saw that you live in \_\_\_\_\_ and I'm going to be out your way tomorrow and the next day **(give 2 choices and try to see them as soon as possible)**, and I **NEED** to set a time to get together with you for about 10 or 15 minutes to review your options. Which day works best for you, Monday or Tuesday? **(Or, which day works best for BOTH of you, Monday or Tuesday? This is to make sure all decision makers are present )**

Prospect: Tuesday.

Agent: Ok. I still have a couple times available on Tuesday, are mornings or afternoons better for you? **(or for you both?)**

Prospect: Mornings.

Agent: I have a 9:30 and 11:00 available, which would you prefer?

Prospect: 9:30

Agent: \_\_\_\_\_, I have your address as 1234 Main St. Is that right?

Prospect: Yes

Agent: Is that a single family home?

Prospect: Yes

Agent: Ok. I have you down for 9:30 on Tuesday. If you would do me a favor and mark it on your calander, that would be great. Now \_\_\_\_\_, so that I'm better prepared when I come out, do you take medications for any medical conditions? I don't need to know what medications you're on, just what they're for.

Prospect: The conditions

Agent: Ok, I have everything I need and I look forward to meeting you Tuesday at 9:30.  
Bye