

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!!)