

MORTGAGE PROTECTION ZOOM PHONE SCRIPT - 1

Hi is [CLIENT NAME] there? Hi [CLIENT NAME] this is [YOUR NAME]. How are you?

Awesome... good to hear.. [CLIENT NAME] I was calling you regarding the letter you got in the mail for Mortgage Protection....you or your significant other filled it out then it back to our office.

Do you remember doing that or know what I'm talking about? (No or yes doesn't matter).

Okay good to know.. Well, I'm the caseworker assigned to getting that taken care of for you.

You indicated here that your birthdate was _____. (If age, say the age and ask when they turn a year older). Great! Are you a tobacco user? Okay and your significant other are they a tobacco user? Okay and I'm sorry I don't think I asked you their name_____?

[CLIENT NAME] since I'm contracted with all the carriers that offer mortgage protection, I know that they make a decision on your coverage based only on your prescription history. So, what prescription medications have you taken in the last 5 to 7 years even if you don't take them anymore...(if they don't remember meds say...)that's okay just tell me what medical conditions you take them for. (Get as much info you can so you can be prepared on OPTIONS slide.) Perfect! That's all I need. So, as I told you I'm the case worker assigned to help you and _____(spouses name) protect each other and your family.

Now [CLIENT NAME] I use to have to meet all my clients in person. They had me flying all over the country. But NOW due to Covid 19 and a potential coming surge, I don't have to do that anymore! I meet ALL my clients on ZOOM, and they love it. Are you familiar with ZOOM meetings? (It doesn't matter if they are or aren't, you will send a one click easy join link). "Perfect" or, "That's okay, it's easy".

Now let's find a time when you are both together.. Is that going to be mornings, afternoons or evenings? I have [DAY] or [DAY] available. Which one of those days works for you? (Book within 48 hours). Great, I will put you in my calendar at that time. Do you have a paper calendar, or do you use your phone to track your appointments? Can you put me in there? Remember

[YOUR NAME] is my name and don't forget to tell ___(spouse's name). I have you all set.

So, what we are going to do that day is go over everything I found for you. I will show you all your options and if we find something you like we are going to apply with the carrier, if you decide at that time you don't want to protect your family that's cool too, we can just have you decline protection and close your file. I get paid regardless because it's my job to at least show you what's possible. Make sense?

One last thing. Will you be joining the meeting on your phone or your computer? (If phone, send a text zoom link; if computer, send an email zoom link and text the zoom link).