

Mortgage Protection Zoom Phone Script 2

Hello [CLIENT NAME]. My name is [YOUR NAME], I'm giving you a call back from the National Mortgage Protection center right here in _____ County. We received your request that you filled out, signed, and sent into our office asking for information on the mortgage life and disability protection for you and your family. I'm the local field underwriter that is assigned to get the information to you and I just need to verify the information you put down to make sure it's correct, okay?

Ok, we have your birthday as _____ And we have your spouse's as _____, correct?

And both of you put down that you are non-smokers, is that right?

Any medical concerns like Cancer, COPD, Diabetes, or anything like that?

Okay, now [CLIENT NAME], most families that fill out the request and get it back to the office it's either to make sure that when they die the mortgage is paid for so there is no financial hardship or loss of income. The second, is more for disability if they get sick, or hurt, the payments are made. Which is more important for the both of you or were they kind of both important?

Ok, perfect. [CLIENT NAME], I'll put together the options and information for you. The way the plans work they are non-medical, no nurse that comes to take blood. They just want me to verify that you are alive, you are both breathing, and you are who you say you are and get the information to you.

With everything going on in the world we are running a little behind as we have more requests than field underwriters currently, so I'm going to make some notes quickly to ensure we set a time that works for both of us. Are you currently working or retired? What time do you typically get home from work? Is your spouse working and if so, what time do they get home from work?

Now, we used to meet with everyone in person but with this on-going pandemic, for safety reasons we are now conducting these meeting through Zoom Video. However, we will still do at-home visits upon request. Are you familiar with Zoom and which option would you prefer?

Currently my schedule is very tight. However, I can squeeze you in after my appointment today at [TIME], or we can do [DAY AND TIME], or [DAY AND TIME]. What time works better for you?

Okay, I will put you down for then. I have your email address as _____, is that the one you want me to send the Zoom link to? Okay and is this your cell phone? Perfect, after we get off the phone, I'm going to email you the link and I'll also text you so that you have my number in case something changes. Just do me a favor and when you get my text just shoot back a Thumbs-Up or your favorite emoji so I know it was received. Great... So [CLIENT NAME] I have you scheduled on [DAY] at [TIME] and I look forward to meeting with you then. Have a great day!