

Final Expense Phone Script

Final Expense Script Intro:

Facebook lead:

Hello (Client Name), hi I'm (Your Name) getting back to you regarding the Facebook request you sent us for the State Regulated Life Insurance Program for burial and final expense, remember it was the one that asked you about your favorite hobby and you said (Their Favorite Hobby).

Mailed in lead:

Hello __, my name is _____ and I'm calling you back from the Senior Benefit Center right here in (City). The reason I'm calling is because you had filled out a request and mailed it to us to get some information on the State Regulated Program to pay for your Final expense/Funeral Expense.

Tele-marketed lead:

Hi (Name) my name is _____, I am getting back in contact with you from regarding the low-cost State Regulated Life Insurance Program for burial and final expense. You received a call the other day letting you know that I would be calling. You said that your favorite color is _____. These state regulated programs are designed to pay your final expenses when you pass away.

-No Pause-

Verify

The purpose of the call was just to confirm some of the information you gave us, make sure I'm reading it right, so I can prepare. You listed your date of birth as (Client's DOB), is that correct? Great!

You listed that you're at (Client's Address), is that correct? Excellent!

I don't see that you listed it, but maybe I missed it, are you a smoker or a non-smoker? Okay great.

Would this be for just yourself or a spouse or partner also? _____

Determining need and interest

Let me ask you this, when you took the time to fill out that form, what was your primary focus, was it just to make sure you didn't burden your family with those expenses or burial and final expense, or were you looking to leave something extra to a spouse or adult children or someone? Okay perfect, that's why 98% of our clients fill these out.

Well there's about a dozen options you can qualify for (Client Name), and there all non-medical, no blood, no urine, no needles I promise. They just make me sit down with you for 15-20 min to make sure #1) that you are who you say you are, that nobody is trying to get insurance in your name, and #2) to make sure you're not hospitalized or bedridden or something like that. Now they have me booked solid in your area the next couple days, but I can still squeeze you in between appointments since we'll only be 15-20 min. I have a (time), and a (time) available, which works better for you? Great!

Book appointment and tie it down

Do you have a pen and paper, I want you to write some info down... Write down my name, it's (Your First Name), write down our appointment time, it's (Appointment date and time), and this is regarding your request for life insurance for burial and final expense. Your confirmation # is _____ (make up simple confirmation # like MB2018)

(If married) Could you do me a favor and let your spouse know that I'll be meeting with the two of you on _____.

Optional tie downs:

- Will my GPS have any trouble finding your place?
- Is this a gated community? If so, what do I need to do when I arrive?

Close the call

Now, since I have a full schedule, and if you weren't there, it would really throw a monkey wrench in my schedule. Now I understand serious emergencies happen, but barring an emergency, is there any reason you wouldn't be there at (Appointment date and time). Okay great, see you then!