

HEY _____ ! IT'S (Your Name)... I'm getting back to you on your request. I'm the field underwriter for _____ County that has been assigned to your request along with others. You recently sent in a form to our office requesting information on the Mortgage Protection Benefit which pays your home off in the event you should pass away or become critically ill or injured.

Do you remember sending that in?

Great / No Problem... THAT'S EXACTLY WHY I CALLED!

I'm the field underwriter assigned to go over the mortgage protection benefit options with you.

They have me schedule your area on _____ and _____ I need 15 to 20 minutes to get together with you. Which day is better?

Great I have an opening at (pick two times such as 5:15 or 6:15) which time works better for you / you both?

Let me verify some information with you real quick.

I show your address as..... (Recite address and Wait for a response)

I show you're born (month, day, year) and you don't use tobacco, right?

And who's your beneficiary going to be? (verify spouses date of birth and whether or not they smoke) GET spouses name

(if they have a spouse) - Your wife (or husband) is born (month, day, year) and is she a non-smoker also?

Now just to confirm, I'm going to slip you in between _____ and _____ on _____, can you think of any reason why you and _____ would not be at home at the time?

I'm going to put you in between _____ and _____ on _____, and that way I can make sure the other families I'm helping would also be taken care of.

Do me a favor, grab a piece of paper and a pen, I want to give you a few things to write down so you are prepared for when Mike our field underwriter arrives. The first thing is, jot down his name, Mike Brenhaug, and then next to his name I want you to write down "mortgage protection" and the date and time I'll be dropping by.

Can you do me a huge favor? Please give (spouse) _____ the heads up and let her/him know we spoke and the day and time that I'll be dropping by to see the both of you to talk over the mortgage protection with the two of you? (Wait for a response)

And lastly, will my GPS have any trouble finding your home at (verify home address)? Is there a security gate or any parking issues that I need to let I need to know about?

Ok great! I look forward to seeing you on (day) @ (time). Have a great day!