

Life Insurance Appointment Setter Script

INTRODUCTION

Hi, is this [Client's Name]?

(Wait for response.)

Great! My name is [Your Name], and I'm reaching out because we've been helping families in your area with affordable life insurance options that offer peace of mind and financial protection.

HOOK / VALUE PROPOSITION

I wanted to connect because many people we've spoken to recently were surprised to learn they could qualify for coverage that fits their budget—without going through a complicated process.

DISCOVERY (optional, if you want to pre-qualify a little):

Out of curiosity, do you currently have any life insurance in place, or are you exploring options for the first time?

(Wait for response, acknowledge briefly.)

That makes sense, and that's exactly why we're here—to help you understand what's available and see if we can find a program that works for you.

CALL TO ACTION

Here's what we do: We offer quick, no-obligation consultations. One of our licensed specialists can walk you through your options and answer any questions.

Would [Day/Time] or [Day/Time] work better for you to chat for a few minutes?

REASSURANCE (if they hesitate):

There's no pressure, and our goal is just to provide helpful information so you can make the best decision for you and your family.

Quick Tips:

- Keep the tone conversational and friendly.
- Use their name early to personalize.
- If they push back with "I'm not interested," you can respond with:
Totally understand! A lot of people feel the same way until they realize how simple and affordable it can be. That's why we offer these quick calls—it's just a chance to see if it makes sense for you. Would [Day/Time] be okay to chat?