

Mortgage Protection Script

Hello (first name) (wait for response). This is (your name) I'm calling about your mortgage in the amount of \$_____ over at (address)_____.

I was getting back to you about the request for (insert lead type/concept here) coverage that is designed to protect your family/pay your mortgage/etc. I just need to quickly verify some of the information you provided so we can get those options to you. I have here your age/DOB is _____. Is that correct? And your spouse's age/DOB is _____.

1. Have you used any nicotine or tobacco in the last 12 months? _____
You don't plan on starting this weekend, do you? _____ LOL
2. How is your health, are you in pretty good health? _____
What medications does your Dr have you on? _____
Have you had the luxury of paying for an overpriced stay at the hospital? _____
Have you had the luxury to being chauffeured by ambulance? _____
Have you had any major surgeries in the past 10 years or so? _____
How about your spouse? Anything for him/her? _____
Any Hx of high BP, DM, CX, heart attack for either of you? _____

What is your height _____ and weight _____

3. What is your occupation? _____
Do you do anything dangerous like a stunt man, rodeo clown? _____ LOL
What does your work schedule look like? (M-F 9-5?) _____
4. (Mortgage Protection) It says the amount of the mortgage to be covered is \$ _____
is that correct? What is your monthly payment? \$ _____. Is that 15 yrs. or 30 yrs.
5. Most importantly, when you sent in the form, what was your main concern?

Was it mostly for coverage on you, your spouse or both? _____

“Ok that makes sense. I'm going to do some research for you and shop around with several of our top rated carriers. Once I get the best options narrowed down for you and your (spouse name). We will connect for a few minutes to review the options. Your job will be to pick out a plan that will fit your needs and budget.

I have a crazy schedule this week. I'm working with a handful of families in your area as well. I have a (time) or (time) appt available on (date).

“Which of those times work best for you and your spouse?” _____

“Ok so you’re positive that time works best for you and your spouse together?”

“Ok grab a pen and paper and let me know when you are ready. I am going to give you my info and few things to have ready for our appt.”

- My name is _____ and what time did we say again? Ok _____ perfect!
- Your driver license / ID
- Dr’s info including name, address, phone number
- Your medications

“Ok I have us scheduled for (Date / Time) Sometimes the families that I am working with need a little extra time with me. So, please give me a 15-30 minute window and I will make sure I give you the time you need as well. If I am running more than 30 minutes behind, I will give you a call.

Have a great day and I will look forward to talking to you on _____ at _____.