

The Seifipour Agency Phone Script

Hello, (first name of client, ie James)?

James, this is (your name) calling about your mortgage. (Awhile back,) You sent a letter/form to us about protecting you and your family in case of an unexpected death or disability, do you remember that? (Do not move on until they remember)

I need to ask you a couple quick questions to see if I can do anything for you on this:

1. It says here you're 53 years old (or whatever it says, **verify** what they completed)
2. Do you smoke or use any tobacco? Any plans to start?
3. How's your health? Do you take any prescription medications? What's that for? (If they take blood pressure meds, find out how many. If they are diabetic, find out if they take pills or insulin and how old they were when they were diagnosed)
4. Any major health problems in the past – heart problems, cancer, stroke, anything like that? (If so, when?)
5. What's your height and weight?
6. What do you do for work?
7. Anyone else living in the home with you?
8. How long did you finance the house and, approximately, what is your monthly payment?

James, I have one last question for you and this one wasn't on the form, but it really helps me know how to help you out best: **What were you looking for this coverage (male)/protection (female) to do for you?** (Write this down, this is the GOLD! – Use this in the appointment to help you close)

Okay, I can definitely help you with this.

I'm scheduled to be in your neighborhood (day(s) – ie Monday and Tuesday) to see 12-15 of your neighbors looking for the same coverage/protection. When do you (and ie Mary) normally get home from work? Okay, I have ____ or ____, which is best?

(Now get them to visualize you coming over by tying it down. ie “How do I get to your street? Do you have a one-story or two-story home? Is there a car or truck out front? Are the numbers on the house or the mailbox? Etc.)

James, one last thing, please give me 20-30 minutes on either side of, what time did we say? I am seeing a lot of families and I could be a little early or a bit late, but I will be there as close to ____ as I can. Have a great day and see you at ____ on ____.