

FFL Mortgage Protection Script

Hello **(Prospect Name)**, my name is _____. I'm giving you a call back regarding the request you filled out, signed and sent in wanting information on the mortgage life and disability protection for you and your family.

I'm the one they have assigned to get this information to you **(Prospect Name)**, and I just need to verify the information you put down to make sure it's all still accurate.

Ok, we have your age as: _____ And we have your wife's age here at _____ is that correct? And both of you put down that you are non-smokers is that right?

Any medical concerns like COPD, Diabetes, or anything like that?

Okay, now **(Prospect Name)**, most families that fill out the request and get it back to the office - it's either to make sure that when they die the mortgage is paid for so there is no financial hardship or loss of income.

The second, is more for disability if they get sick, or hurt, the payments are made. For you and your spouse which is more important or were they kind of both important? (Wait for a response.)

Ok, perfect. **(Prospect Name)**, I'll put together the options and information for you. The way the plans work they are non-medical, no nurse that comes to take blood or have you pee in a cup.

They just want me to verify that you are alive, you are both breathing, and you are who you say you are and get the information to you.

As far as our schedule **(Prospect Name)**, we've been several weeks behind with so many requests coming in. I'm the one they've assigned to help you out, and I'm going to put some notes down here for you guys.

Your schedule **(Prospect Name)**, are you working full-time? (Wait for a response.)

What time are you typically back in the door from work Monday thru Friday? (Wait for a response.)

What about your spouse? Do they work as well? (Wait for a response.)

Looking at my schedule I don't have anything tomorrow at 5:30, but I do have something on Tuesday at 4:30 or 6:30 and I can go ahead and squeeze you in there. I'll have about 15

appointments, so I won't have a lot of time, but I will have about 5 or 10 minutes to get the information to you.

The only thing that I do ask because of my schedule and how behind we are is that you give me a window between ____ and _____ would that be okay? (Wait for response.) Ok great.

I have you guys down for tomorrow between ____ and _____.

Can you do me a favor and grab a pen and paper? I want you to jot down a few things about our meeting.

First, jot down our appointment time for ____ @ ____ and next to that put my name and mortgage protection. And the last thing is if you can let your spouse know that I'll be dropping by to get the information to you guys.

I just want to verify your address as _____. Is that correct? Ok perfect.

Will my GPS have any problems finding your place? So I can spot your house easily? What color is your house?

Ok, **(Prospect Name)**, the only thing that I do ask and expect because of the schedule and how behind we are is that you definitely make sure you and your spouse are there tomorrow between ____ and ____ is that fair enough? (Wait for a response.)

Ok, **(Prospect Name)**, I look forward to meeting you guys and helping you and I'll see you on ____ between ____ and ____.