Mortgage Protection Script

Hi, **NAME**?

**HEY NAME**, this is Steven calling from the Mortgage Protection Office here in Mecklenberg County.

I’m getting back to you about the form you filled out and mailed back to us about a program

that pays off your mortgage in case of a death or disability.

**[ WAIT FOR ACKNOWLEDGEMENT ]**

Perfect. **NAME**, I’m just the agent that is assigned to your case. I need to verify some

information with you.

I have here that your DOB is this **January 1st, 1950**? [ Great ]

And you **do/don’t** smoke or use any tobacco, correct? [ Ok ]

And the address I have listed for you is **123 Main Street in Chino Hills**?

Is this your primary residence or rental property? [ Perfect/Awesome/Great ]

What I’m going to do, **NAME**, is I’m going to put together a few different options for

**you/and your family** so you’ll have some choices to pick from.

Pretty much what we do is non-medical. What that means is unlike traditional life

insurance, you DO NOT have to draw blood or pee in a cup. The only requirement that I

have from the insurance carriers is that I have to verify your ID and mortgage statement to

make sure the names on both are the same.

Does that make sense? [ Normally, they say OH OF COURSE ]

I’m going to be dispatched in the Chino Hills area this upcoming Tuesday and Wednesday.

What time do you and your spouse get home from work?

[ They said 6pm ]

**--- WHATEVER TIME THEY SAY ---- Your goal is to fit them in YOUR slot, not for you to**

**fit in their slot**

Ok. **NAME**, I don’t have a 6pm. But I have an opening between 6:30-7:30pm. Outside of an

emergency, would there be any reason why you and your spouse wouldn’t be home

tomorrow between 6:30-7:30pm?

Ok perfect. Once again, **NAME**, my name is Steven from the Mortgage Protection Office. I’ll

see you this **WEDNESDAY** between **6:30-7:30PM**.

Sounds good, **NAME**, I’ll see you soon. Have a good one.