Mortgage Protection Call-In Script

Hi, **NAME**?

**HEY NAME**, this is Alex calling about your mortgage in amount of [Loan Amount] with [Lender] Bank. I’m getting back to you about the postcard you received in the mail regarding your mortgage. You called the number and verified your contact information so that we could contact you back regarding the program that pays off your mortgage in case of a death or disability. Do you remember that?

**[ 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.