

January 12, 2021. Prepared by Millie Porcena

FINAL EXPENSE PHONE SCRIPT

Hey _____, it's _____ I am just getting back to you REAL QUICK regarding the form you **FILLED OUT** and **SENT** back to us about the **State Regulated Life Insurance Program**

I am the local field Underwriter that has been assigned to you, the purpose of my call is to **VERIFY** the information you filled out so I can get this out to you. It looks you put down **(verify their information Age, Address, Single-Married- Significant other)**

Great. My job is real simple. Everything we do is **NON medical** meaning no one is coming to your **home to draw blood, or take a urine sample or anything like that.** However, Since this is a state regulated program I am required by the State to verify your identity and figure out what you MAY qualify for. It typically takes about 15 minutes to go over the information.

They have me servicing your area tomorrow. Are you currently working or are you retired? **(*if retired)** Do you have any doctor's appointments?
(*if working) When are you (/and your spouse) typically home **(together?)** Great! My schedule is getting pretty booked, I can **SQUEEZE** you in at _____ or _____?

So I can properly prepare for you, do you have any major medical issues like Cancer Stroke, Heart Attack, Insulin Diabetes, Bipolar

Hey _____ **How good are you at keeping your appointments?** Great, _____ I have lot of families to meet with and will do everything to respect your time, we kindly ask you respect (His/Hers) as well. **ANY REASON YOU WOULDN'T BE HOME AT THAT TIME?**

Tie downs: (Select which applies)

- Do you live in a Single Family home or Apartment?
- Now, _____ Is it EASY to see your house number from the street? (especially in the dark).
 - Do you live in a private community that requires a code to get in?
 - Please have your photo id(s) available
- I will be driving _____ and will have a copy of my State License ID

MORTGAGE PROTECTION EXPENSE PHONE SCRIPT

Hey _____, it's _____ I am just getting back to you **REAL QUICK**, (from the Mortgage Protection Center) regarding the form you **FILLED OUT, SIGNED** and **SENT** back for your property at ___(address)___ .

I am the local field Underwriter that has been assigned to you, the purpose of my call is to **VERIFY** the information you filled out so I can get this out to you. It looks like you put down **(verify their information Age, Address, Single-Married- Significate other)**

Great. My job is real simple. Everything we do is **NON medical** meaning no one is coming to your **home to draw blood, or take a urine sample or anything like that.** However, Since this is a state regulated program I am required by the State to verify your identity and figure out what you **MAY** qualify for. It typically takes about 15 minutes to go over the information.

They have me servicing your area tomorrow. Are you currently working or retired?

(*if retired) Do you have any doctor's appointments?

(*if working) When are you (/and your spouse) typically home (**together?**) Great! My schedule is getting pretty booked, I can **SQUEEZE** you in at _____ or _____?

So I can properly prepare for you, do you have any major medical issues like Cancer Stroke, Heart Attack, Insulin Diabetes, Bipolar

Hey _____ **How good are you at keeping your appointments?** Great, _____ I have a lot of families to meet with and will do everything to respect your time, we kindly ask you respect (His/Hers) as well. **ANY REASON YOU WOULDN'T BE HOME AT THAT TIME?**

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- I will be driving _____ and will have a copy of my State License ID

NUEVO GUIÓN DE TELÉFONO DE GASTOS FINALES / MP

_____?

MP

Hola _____, es _____. Me estoy comunicando con usted (del Centro de Protección Hipotecaria) con respecto al formulario que **LLENÓ, FIRMÓ y ENVIÓ** para su propiedad a ____ (dirección) _____.

FEX

Hola _____, es _____. Me estoy comunicando con usted con respecto al formulario que **LLENÓ y nos ENVIÓ** sobre el Programa de seguro de vida regulado por el estado

Soy el agente de campo que se le ha asignado, el propósito de mi llamada es **VERIFICAR** la información que completó para que pueda comunicárselo. Parece que has anotado **(verifica su información Edad, Dirección, Soltero casado – Ser querido)**

Excelente. Mi trabajo es realmente sencillo. Todo lo que hacemos **NO es médico**, lo que significa que nadie vendrá a su casa **para extraer sangre, o tomar una muestra de orina ni nada por el estilo**. Sin embargo, dado que este es un programa regulado por el estado, el estado me exige que verifique su identidad y averigüe para qué PUEDE calificar. Por lo general, se tarda unos 15 minutos en repasar la información.

Mañana me tienen atendiendo su área.

(* si está jubilado) ¿Tiene alguna cita con el médico?

(* si trabaja) ¿Cuándo están usted (/ y su cónyuge) normalmente en casa (juntos?) ¡Genial!

Mi agenda se está poniendo bastante reservada, ¿puedo apretujarlos a las _____ o _____?

Así que puedo prepararme adecuadamente para usted, ¿tiene algún problema médico importante como cáncer, ataque cardíaco, insulina, diabetes, trastorno bipolar?

Oye _____ **¿Qué tan bueno eres para asistir a tus citas?** Genial, _____ Tengo muchas familias con las que reunirme y haré todo lo posible para respetar su tiempo, le pedimos amablemente que respete (el / ella) también. **¿ALGÚN MOTIVO POR EL QUE NO ESTARÍA EN CASA EN ESE MOMENTO?**

Amarres: (Seleccione el que corresponda)

- ¿Vive en una casa o apartamento unifamiliar?
- Ahora, _____ ¿Es FÁCIL ver el número de su casa desde la calle? (especialmente en la oscuridad).
 - o ¿Vives en una comunidad privada que requiere un código para entrar?
 - o Tenga su (s) identificación (es) con foto disponible
- Conduciré _____ y tendré una copia de mi identificación de licencia estatal