

Hi (Client)

My name is (NAME), I'm just getting back to you about the request you made online to get information on life insurance. I have your date of birth as (DOB) and your address as (ADDRESS) is that correct?

Perfect, the reason for my call is I'm the local underwriter assigned to get you this information. Are you (or you and your spouse) typically home in the mornings, afternoons, or the evenings?

Great, I'm actually going to be in your neighborhood meeting with about 10 other families tomorrow and it's only take me about 15 minutes to go over what you qualify for. I have either a (time or time) available, which one works best for you?

Perfect, I'll be coming from a full day of appointments so please give me 15 minutes on both sides of (APPT TIME) but I'll do my best to get there on schedule. To verify your address, I have (ADDRESS), what color is the house so that I know I'm there?

I don't have much time so if you could have all of your medications out along with any life insurance policies currently in force, it will speed the process up.

WHY DO YOU HAVE TO COME TO MY HOUSE?

We don't have an medical exams so the State requires that we meet in person. We make it easy on you and come to you rather than come to us.

I JUST WANT THE INFORMATION:

Perfect, that's all I'm doing is bringing you the information you requested, what you do with it from there is up to you.

NOT INTERESTED.

I get it, most people say that because they don't think they can get coverage or afford it. It'll only take me 5 minutes to get the information I need to show you what you qualify for.

CAN YOU EMAIL IT?

I wish I could, that would make my job much easier, but representing 14 different companies and not knowing anything about you, I wouldn't know what to send you. And again I have to verify your identity and make sure you're not on strapped to a hospital bed on oxygen or 1,000 pounds.