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## TELEPHONE SCRIPT

(It is recommended that YOU door knock and DO NOT set telephone appointments, as you will Waste Leads)

Hi, may I speak with **(Client's Name)**? Hi, **(Client's Name)**, my name is **(Agent's Name)** and this is **NOT** a solicitation call. The reason for my call is you and/or (spouse) sent in a request of a little rectangular card for information on the (State you are calling to) state-approved funeral expense plan. Your reply says (Provide them the information they completed on the card like; name, address and date of birth).

The card stated that Social Security would only pay up to **\$255** towards these expenses and your loved ones would be responsible for the balance of expenses that Social Security does not pay. If you recall, we are going to provide you with the information and a free memorial-planning guide. My job, **(Client's Name)** is to provide you with the state-approved program information you requested that will provide your loved ones with **up to \$25,000** in the event of death.

What I'd like to do is swing by and drop-off the information you requested.

So, remember **(Client's Name)**, this is a state approved plan that can take care of all of your funeral expenses so your family will not have to be burdened with this expense.

So, would (day) or (day) work for you?

What is better (time) or (time)?

### Confirm Appointment

Ok, **(Client's Name)**, I've got you down at **(appointment time)**. I need to give myself a 30-minute window, just in case I'm running a little behind. Now, is your address still **(Address on the card)**?

**(Client's Name)**, I'll have my **ID Badge** with me. Please jot down our appointment time and my phone number – and **(Client's Name)** please call me should an emergency arise, okay?

I look forward to seeing you **(day schedule)**; have a **GREAT** Day **(Client's Name)** and thank you for your time.