Hello (Client Name),

This is NAME and I’m getting back to you about the information you requested a little while back about the life insurance protection.

I’m just the field underwriter that’s been assigned to get the information out to you so I just need to verify the information you provided so I can get these life insurance options out to you.

It was the one where you put down your Beneficiary as?

I have your DOB as\_\_\_\_\_?

Ok and You’re over on? (address)

And that’s in CITY/TOWN?

Ok, great. I’m just going to put down some notes here.

Are you Married, single or widowed?

Are you working, retired or disabled?

Spouse- working, retired or disabled??

If working-> What time are you typically back in the door from work? Your Spouse?

Great, my job as your field underwriter is simple. We work with a variety of companies so it’s just my job to get the different options out to you and show you what you qualify for. The plans are all non-medical, meaning no blood and no urine so it only takes about 15 minutes to go over the options.

The reason for the call today is because they do have me in your area over the next two days getting this information out. It only takes about 10-15 minutes for me to show you what you qualify for. Do mornings or afternoons typically work better for you?

I have DAY/TIME AVAILABLE or DAY/TIME AVAILABLE, what time is better?

Ok, I will put you down then.

(TIE DOWN)

Just grab a pen and paper so I can give you some information about myself.

My first name is NAME that’s (SPELL FIRST NAME OUT) my last name is NAME (spell out) and if you could go ahead and right down I have you and your spouse in for this upcoming \_\_\_\_ (day) at \_\_\_ (time). I do ask for about a 30 minute window just incase the family before you has a few extra questions or I hit any traffic.

That should be all I need. What time did I say again?

Ok, if you could write down that time at the top of your paper as I will be there at TIME on DAY.

And you don’t see any reason as to why you and (spouse) wouldn’t be there \_\_\_ (day) at \_\_\_ (time) right?

Ok.

Last thing before I let you go I have you here at (ADDRESS) but I am really bad with directions what color is the home on the outside just so I know I am in the right place?

Is there street parking or should I park in the driveway?

And does the doorbell work or just give a knock on the front door?

Great, other than that I look forward to meeting with you and (spouse) on \_\_\_\_\_ (day) at \_\_\_ (time) have a good day.