“Hey, (name). This is (your name). I’m calling about your mortgage in the amount of $\_\_\_\_\_\_\_\_\_\_ with \_\_\_\_\_\_\_\_\_\_ bank **(*if no bank use address* “over on 123 Main St in Malden”).** I was just getting back to you about that form you had sent in a little while back, regarding the mortgage protection coverage, you remember that right? Ok, you just came across by desk as some **last resolution** so I’m just going to verify some of the information you provided so we can work up some options for you.”

1. You put down that your DOB (or age) as \_\_\_\_\_\_\_\_\_\_ right?

2. And neither of you use tobacco in any form is that right? ***(if they are did not check smoker or non-smoker always assume non-smoker they will correct you if not***) No plans to start over the weekend right \_\_\_\_\_? (***this is intended to make your client smile)***

3. Any major medical concerns at this time?

4. On the letter, it says the amount of the mortgage to be covered is $\_\_\_\_\_\_\_\_\_\_, is this right?

5. Most importantly, when you sent in the form, who were you looking to protect? Was it mostly for coverage on you, (spouses name), or both, what was your biggest concern?

**(SET APPOINTMENT.)**

**Ok I am just the field underwriter assigned to your case. My job is real simple, it takes me about 15 minutes to show you the coverage you’ll qualify for. They have me wrapping up with a handful of homeowners in your area this week, what time are you and your spouse typically in together on a regular weekday?**

**Ok I have a \_\_\_\_\_(day) at \_\_\_ or \_\_\_ (time) what’s better?**

**(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 AND LAST 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 homeowner before you has a few extra questions or I hit any traffic, if I am running any later than that I’ll give you a shout.

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 \_\_\_\_\_\_ night. And you don’t see any reason as to why you and (spouse) wouldn’t be there \_\_\_ (day) at \_\_\_ (time) right? Ok I will save you this last spot then.

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 park right 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.