

## Facebook Final Expense Phone Script

Hello (Client Name), hi I'm (Your Name) getting back to you regarding the Facebook request you sent us for the State Regulated Life Insurance Program for burial and final expense, remember it was the one that asked you about your favorite hobby and you said (Their Favorite Hobby).

-No Pause-

The purpose of the call was just to confirm some of the information you gave us, make sure I'm reading it right, so I can prepare. You listed your date of birth as (Client's DOB), is that correct? Great! You listed that you're at (Client's Address), is that correct? Excellent! I don't see that you listed it, but maybe I missed it, are you a smoker or a non-smoker? Okay great.

Let me ask you this, when you took the time to fill out that form on Facebook, what was your primary focus, was it just to make sure you didn't burden your family with those expenses or burial and final expense, or were you looking to leave something extra to a spouse or adult children or someone? Okay perfect, that's why 98% of my clients fill these out.

Well there's about a dozen options you can qualify for (Client Name), and there all non-medical, no blood, no urine, no needles I promise. They just make me sit down with you for 15-20 min to make sure #1) that you are who you say you are, that nobody is trying to get insurance in your name, and #2) to make sure you're not hospitalized or bedridden or something like that. Now they have me booked solid in your area the next couple days, but I can still squeeze you in between appointments since we'll only be 15-20 min. I have a (time), and a (time) available, which works better for you? Great!

Do you have a pen and paper, I want you to write some info down... Write down my name, it's (Your First Name), write down our appointment time, it's (Appointment date and time), and this is regarding your request for life insurance for burial and final expense.

Now I'll be coming from a ways away, and if you weren't there, it would really throw a monkey wrench in my schedule. Now I understand serious emergencies happen, but barring an emergency, is there any reason you wouldn't be there at (Appointment date and time). Okay great, see you then!

## Facebook final expense lead script

Hi (prospect name), This is \_\_\_\_\_ I'm getting back to you regarding the post you responded to for information on the **state regulated final expense programs** which covers your burial expenses.

(prospect name), just to authenticate the call you put down your favorite hobby as \_\_\_\_\_. Do you remember that? (wait for a response) Great!

(prospect name), My job as the local field underwriter for \_\_\_\_\_ county is to sit down with you to see what programs you might qualify for.

(prospect name), you put down your date of birth as \_\_\_\_\_ is that correct?

Are you still working or retired? (this will help you determine when to fit them in your schedule)

(prospect name), The company has me scheduled for your area on (day you are in the field) meeting with about 12 other people so I won't have a lot of time but I can squeeze you in between appointments on (day\_\_\_\_\_) I have 10:00 am or 4:00 pm. (use the times that work for you as an agent and Control your schedule)

Which time works best for you?

Ok. I'll put you in down for \_\_\_\_ (day) at \_\_\_\_ (time), because we have full schedule is there any reason why you wouldn't be home at that time and you know for sure works for you? Ok.

\_\_\_\_\_ is there any medical concerns I need to be aware of, like heart issues, diabetes, copd?

Ok. Will be GPS have any issues finding your place?

Ok. (prospect name) can you do me a favor and grab a pen and paper I want to give you some info to jot down....

First, jot my name down \_\_\_\_ and the time I'm going to be at your place which is \_\_\_\_\_ @ \_\_\_\_\_

Do you have a spouse or partner? Can you do me a favor and let them know that what time I'll be dropping by to show you what State Regulated Final Expense programs you qualify for.

Have a great day and I'll see you on \_\_\_\_\_ @ \_\_\_\_\_

## V2 FACEBOOK LEAD SCRIPT

Hi Brenda?

Hi Brenda, this is \_\_\_\_\_ and I'm just getting back to you about the form you sent back to our office about the state regulated plans to pay for final expenses. On the form you put down your favorite hobby as "\_\_\_\_\_". Does that sound right?

Ok great! I'm licensed by the state of Idaho and I've been assigned to help you.

I'm calling today because you do qualify for the newest plan, and I'll be in your area all day tomorrow helping people with this. I only have about 15 mins to show you what you qualify for, and then I'll be out of your hair. Is before lunch or after lunch better for you?

Okay great, I have a 1:30 or a 4pm open, which works best?

Perfect, I've wrote you down for 4pm. Can you do me a favor and write me on your calendar, so that way we don't miss each other, ok?

And just to confirm, I've got you at 123 Main Street? And that's \_\_\_\_\_(city), right?

Okay great, is that pretty easy to find with a GPS.

Perfect. Now Brenda, if you're not there tomorrow at 4, it'll really throw a monkey wrench in my schedule. I know occasionally emergencies do come up, but barring an emergency, is there ANY reason you won't be home tomorrow at 4pm?

Okay great, again my name is \_\_\_\_\_... I'll be coming in a blue car, so when I pull up, you'll know it's me and you don't have to sick the dogs on me okay? (Laugh)

Ok Brenda, See you tomorrow at 4pm, bye-bye!"

# V1 FACEBOOK LEAD SCRIPT

"Hi Brenda?

Hi Brenda. My name is \_\_\_\_\_ and I'm licensed by the state of \_\_\_\_\_ and I've been assigned to help you. You filled out that form on Facebook about the NEW State Approved programs for 2018 that help you pay for any final expenses and burials, and take the burden off the family. And you put here that \_\_\_\_\_ is your favorite hobby does that sound right?

Okay great, I'm calling today because you do qualify for the newest plan, and I'll be in your area all day tomorrow helping people with this. It's a free appointment, but I'll need about 15 mins of your time to show you what you qualify for, and then I'll be out of your hair. Is before lunch or after lunch better for you?

Okay great, I have a 1:30 or a 4pm open, which works best?

Perfect, I've wrote you down for 4pm. Can you do me a favor and write me on your calendar, so that way we don't miss each other, ok?

And just to confirm, I've got you at 123 Main Street? And that's \_\_\_\_\_ (city), right?  
Okay great, is that pretty easy to find with a GPS.

Perfect. Now Brenda, if you're not there tomorrow at 4, it'll really throw a monkey wrench in my schedule. I know occasionally emergencies do come up, but barring an emergency, is there ANY reason you won't be home tomorrow at 4pm?

Okay great, again my name is \_\_\_\_\_, that's \_\_\_\_\_ (spell name out)... I'll be coming in a white car, so when I pull up, you'll know it's me and you don't have to sick the dogs on me okay? (Laugh)

Ok Brenda, See you tomorrow at 4pm, bye-bye!"