Hello \_\_\_\_\_\_

This is AGENT NAME. I’m giving you a quick call back from the Massachusetts benefits center here in (their county).

I’m getting back to you about the form you filled out and sent back in the mail a little while back. It was the one about the state regulated final expense and burial life insurance programs to make sure your final expenses are taken care of when you pass. You remember that, right?

Great, this form came across my desk as some last resolution - it looks like your file has been open for more than 30 days.

It’s just my job to verify the information you provided so I can get these options out to you.

I have you over on \_\_\_\_\_

I have your age as \_\_\_\_

You did not list a spouse - are you married, single or widowed?

Are you still working, retired or diabled?

Great, i’m the field underwriter that’s been assigned to get these options out to you and show you the programs you qualify for.

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?

Okay,

I can put you in on (day) at (time) or on (day 2) at (time), what works better for you?

Can you just grab a pen and paper I am going to give you some information about myself for the appointment.

My first name is (spell out first name) and by last name is (spell out last name).

I’m going to give you a confirmation code just safety reasons that i’ll ask you at that the door - that way you know it’s me and I know it’s you. The confirmation code is going to be FFL17.

I have you in my schedule here for (day) at (time).

I do kindly ask you for about 20-30 minutes on either side of that sometimes I’m a few minutes late, sometimes I'm a few minutes early. It just depends on the family that I'm helping before you.

Please have your driver’s license/State ID, Medications or medication list and any life insurance policies that you currently have in place readily available.

Now I have you over at (address) Is that a home, an apartment or condo?

What color is it on the outside - so I know I am in the right place?

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

The doorbell works or just give a knock?

Ok, Great I have you in my calendar here for  (day) and (time) .

 I look forward to meeting you and helping you protect your family. Have a great day!