

TKA Mortgage Protection Phone Script

Hi (Prospect First Name)

This is (Agent/Scheduler Name)

I just received the form you filled out about your Mortgage Protection on your (say Address) Property.

I am the local Agent/Scheduler assigned to help you.

*Do you re-call sending that in?

Great!

I just need to verify the information you sent in and get a couple questions answered so we can work up the options that are available to you for coverage.

Go straight to filling out Mortgage Protection Qualification Form now

When form is complete

Okay that should be enough to get started.

What is the best time for you to meet with us to discuss the options, Afternoon or Evening?

(if they are a couple say "all three of us")

Great! I have a (say two times, then go from there to set the appointment)

Perfect! I am marking this down on our schedule now.

Do you have a pen or do you need a minute to grab one?

(If you are a scheduler, now is where you will edify your agent)

Okay (fill in appointment on the bottom of qual form as you read it to them)

To finish, it's important to let you know that we truly respect your time.

Not only that but also, the time of our agent, who will be driving out to see you, and the time spent here with you on the phone today.

With that being said, do you see any reason at all, why this appointment will not stand?

Perfect!

If an emergency comes up we will certainly call one another and reschedule.

Great I have you marked as confirmed.

See you on (say the day and time once again)

Notes

(Always keep it simple and move forward swiftly.)

If they say NO I don't remember for whatever reason here are some responses.

- 1) Well it may have been a little bit ago, but I just got it today and I have all your information here in front of me? Its says, In case of death, disability, illness... that your mortgage payment will be paid and keep your family from losing their home.
- 2) You indicated here (start reading the form) is that correct?
- 3) It may have been your husband/wife and it sounds like they are concerned right?
- 4) Have you obtained the coverage to protect your family yet?

If they yes to #4 ask

(If they are 60 or below)

Ask "Just to be sure, were you told about the new policies that return your all your premiums or the policies that build cash values for your family and retirement?"

"I would be more than happy to come out (or set up a meeting) and make certain that you are set up with the best policy possible for your situation. We work with most all of the top companies in the country, we have a great team of experts, and our goal is to make sure you're properly covered."

Here are some phrases that have come in handy for most rebuttles

"That is exactly why I am calling"

"Your agent (or I) can explain that in detail at your meeting"

"We can definitely cover that when we meet"

"It is important that I make sure you get the information you requested"

"This information helps the agent be able to find you the best coverage for the best price"

You can ask your Managing Partner for more information if you run into issues.

We will also have ongoing training calls and Q and A sessions to help you improve as you go!