

Mortgage Protection Phone Script- Rob Richman

Hello, _____ [prospect's name]? Hi, _____ [prospect's name], this is _____ [your name] and I am giving you a call regarding the mortgage protection response card you sent in on your loan through _____ [bank name]. Again, I'm calling because this is the type of coverage that if anything happens to you (or your wife) the **entire mortgage gets paid off for you and your family**, and that's what y'all are looking for, right? Perfect!

Now, I have your address listed as _____ [read off address]? Great.

And the loan amount is _____ [loan amount]? Perfect, is this a new home purchase or refi? What is the new monthly mortgage payment?

And you put down your date of birth as _____? And your wife's as _____? Great.

Now, I get quite a few of these responses per week so I need to do a little screening health-wise.... are you and your wife in good health? Great!

In the last 7 years have you been treated for any of the following:

Cancer, heart attack, stroke, heart failure, COPD, diabetes requiring Insulin? Okay, great. (Or, "no problem" if they list one)

How about the small stuff like high blood pressure, cholesterol, anxiety/depression, thyroid? Ok, great! (or, "no problem" if they list one)

So, listen _____ [prospect name], the reason I was asking you all of those questions is because I am a broker. What that means for you is that I am going to shop and customize the best plan to fit your situation and, most importantly, your budget. So, what I do for all of my clients is set up 15-20 minutes at the most to get together, go over all of your options, answer all of your questions of course, and if you see something you like, great! If not, no problem! Fair enough?

I'm going to be in your area Monday and Tuesday this week. It looks like I have something open on Monday at _____ or Tuesday at _____. Which one of those times works best for you?

Now _____ [prospect's name] the address to your house, the numbers, where will I find those? On the house, the mailbox, or the curb? Awesome, I'm going to send you a text message with all of my contact information and the day and time that we set so if there's any issue just shoot me a text and we'll recoordinate our schedules for a different time. Look for that in about 2 minutes.

No news is good news, so if I don't hear from you I look forward to seeing you and _____ on _____ day and time!

