**LIFE INSURANCE**

**INTRODCUCTION**

Client answers: (Client name)?.... Hey (Client name) this is \_\_\_\_\_\_, with the Benefits Office right here in (County). I was just getting back to you about that form you had filled out online about the life insurance information. You listed your date of birth as (enter DOB). That’s you right?

Perfect, (Client name) I’m just the field underwriter assigned to get the information to you and see what coverage you’d be eligible for. They just send me out there for 10-15 minutes to see if we can help you out.

**FIGURE OUT THEIR SCHEDULE**

(Client name) are you working disabled or retired?

* If working: What time do you typically get off of work?
* If retired: Do you have any doctors appointments on (enter day)?

Ok and are you married or single?

* If married: And are they currently working, retired or on disability?

**TELL THEM YOU’RE COMING OVER**

Ok, I have about 10 other families I need to see (enter day), I already have a (enter time) booked, but what I’ll do is put you down for a (enter time) for about 10-15 minutes to get this information back to you.

**TIE DOWN THE APPOINTMENT – GET THEM TO VISUALIZE YOU COMING OVER**

The (enter street address),what color is the house?

And will the numbers be on the driveway or the front door?

Great, can you do me a favor and grab a pen and paper so you can take down my information?

* Provide:
  + Name
  + Appointment date & time. Give an hour window. So if they appointment is at 9a, say I’ll be there between 830-930a
  + Confirmation Code. Mine is CT21 (make one up, sounds more official)

Awesome. I’ll be driving a (enter car type) so when you see that pull up, you know you have the right person. You have a great day and I’ll see you on (enter day) between (enter time) and (enter time).