**FINAL EXPENSE**

**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 in online about the state regulated final expense programs. It’s where you put your favorite hobby/color down as \_\_\_\_\_\_\_. 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).