

## Mortgage Protection Phone Script guidelines for older leads.

There are 5 distinct and important sections to the phone script.

1. Introduction
2. Gather information
3. The Why
4. Book the appointment or the Pivot
5. Lock-it-down

Consider SFG's "B.E.S.T." script to be like the outline or 'Skeleton' and it's up to you to fill in the 'skin and hair'...with your character and personality.

The following is the "introduction" piece that I have found works very well for me.

Hi Bob, this is George...George Mathews. I'm following up on some paperwork that you, or someone in your household, sent in for information on the benefit that would pay-off or pay-down your loan in the event of a death or disability. It might have been a while back when you settled on your Wells Fargo loan of \$250k, on your home over on, 123 Main St., here in Tampa.

I'm the state certified field underwriter that has been assigned to your request, so I'm just required to verify a few things in order to get some options out to you...now, it says here that your age/DOB is....

(immediately begin verifying the data that you already have on the lead)

Now resume with the 'Best' script and complete the "Client Qualification Form"