

AGED MORTGAGE PROTECTION SCRIPT

John?

John, this is _____.

I'm giving you a call back from the Mortgage Protection Department regarding your home loan with (Lender)

(The LENDER might have changed already. So if they said it's no longer with the one listed, say "Got it, so they sold your loan already? Not a problem.")

We did a recent audit and noticed your file was still open.

We've been backed up due to (**Covid** or **Layoffs**)

The reason why we're calling is because our records show that no one got you the information on paying off the house in case of a death. Do you remember anyone getting you that information?

*If they say **NO**:*

I apologize once again.

I have here that your DOB is _____. Is that correct?

And your address is _____. Is that right?

*If they say **YES**:*

Perfect. I'm going to go ahead and get you the updated 2023 plans that are priced a lot better with the updated features.

I have here your DOB IS _____. Is that correct?

And your address is _____. Is that right?

Perfect. Once again, my name is _____ and I'm the senior underwriter assigned to your case.

It usually takes me 20 minutes to go over the options with you on the phone.

Do you have time to do that right now?

*If they say **YES**:*

Go right into ONE CALL CLOSE (proceed to Setting The Table + Financial Inventory)

*If they say **NO**:*

Book an appointment. (proceed to bottom)

Not a problem. I'm pretty filled up the next two days but I can squeeze you in tomorrow. What works better afternoon or evenings? 6:00 or 7:30?

Great, John. Grab a pen and paper and let me know when you're ready.

My name is _____.

Confirmation code is FFL94P.

And what time was our appointment again? _____. That's right, 7:30pm.

Now is there any reason why you won't be available to answer the call tomorrow at 7:30pm? Ok great, look forward to helping you and your family tomorrow at 7:30pm. Have a good evening.