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LOW & SLOW!!! SLOW DOWN!!!

1. Go _____

LOW & SLOW!!! SLOW DOWN!!!

(*'s mean EMPHASIZE in tone & r.'s mean RUN THROUGH & PLEASE OBSERVE EVERY COMMA)

GO!

Hello (client's first name)?

Hey this is (Your First Name), I'm just giving you a call *to get back with you about that letter you had sent in (sen-ten) to protect your family regarding your mortgage, in the amount of ($ amount) with (financial institution).

-*This is just a follow up, to see if you ever did get anything in place.

(No, OR ANY RESPONSE)

Ok, I see. Well, that's exactly why I'm calling.

The letter indicates your birth-date is (state their birth-date) & you're currently (height & weight) and are a (smoker status) Is that still correct?(If there is a spouse, also repeat for spouse/co-borrower by stating, "I see here as well there is a (state other person's name)" and continue the format. Once complete proceed to next part of script)

Ok, Great.

- Do either of you/you have any medical problems that you *know about?

- & Do either of you/you have a history of ever having had a stroke, cancer, or heart attack in the past?

-

Ok, any Respiratory issues such as Sleep Apnea or COPD?

- What about any surgeries in the past 5 to 10 years?

- Ok, do you all take any prescription medications for anything?

- Definitely. And lastly Mr. /Mrs. (first name), what's your occupation these days? And as well what does your spouse do?

- And is the *($x,y,z) amount still the r. current amount of the mortgage? And is there a second mortgage with that?

r.Ok, definitely that is just fine. Well, what I'm going to do for you is put together about *8 or 9 different proposals available *to you, and I'll pick the best 2 or 3 that'll probably benefit *you the most.

- When would be a convenient time to sit down with the two of you to go over those? I'll actually be protecting a few other local families in *your area on Monday & *Tuesday (or whatever day you're scheduling for) of next week. Uh, r. would you prefer early afternoon or late evening? (wait for response)

- Ok, for (state preference) on (state day) I have a (state an appointment time) & a (state another appointment time & wait for response) (adjust /days/times as needed)

Ok great. Coming from (wherever/city/location), how do I get to your house? Does it usually come up pretty easy

via gps?

What color is the house? Ok, that sounds nice.

And depending upon how long it takes me to service the family before *our appointment, I* may need 30 minutes give or take, on either side of that hour as I could run a little early ooor a *little behind. I'll be pulling up into the driveway in a (color of your car & make), (your car model) model sedan/suv so, *be on the lookout for me. (smile)

Alright, Mr./Mrs. (first name), I look forward to seeing you all at (state apt. time & day) correct? Ok, great and Mr./Mrs. (first name), if for some reason you cannot keep the appointment, please feel free to call me and reschedule. On average I have about 5 or 6 families a week who want to see me, who *I just don't have openings for and end up having to postpone servicing them & I *might be able to squeeze them into your time slot should you need to reschedule ok?

Alrighty. So, with that being said again, my Name's (name), & I definitely look for forward to handling your case Mrs. /Mr. (cx's first name) Thank you *so much for your time. (smile) Ok, bye bye

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