



DIGITAL FE PHONE SCRIPT

Hello ***(Client's Name)***?

Hi, this is **Agent's Name** and the reason for my call is that you recently requested information about Final Expense Life Insurance in **State you are calling**. I've been personally assigned to assist you with the simple enrollment process and to see if you qualify for coverage. This only takes a few minutes and I will first confirm some of the information you submitted. This confirmation will make sure I'm speaking with the right person and also reassure you in knowing that I'm not a telemarketer and reaching out to assist you after you provided all of the following personal info on **DATE @ TIME**.

You're at **Address on the card**?

You stated that you're _____ years old.

You are interested in \$ **Coverage Amount** and upon your passing, you would like your

Beneficiary relationship, Name of Beneficiary to receive the tax free proceeds.

This amount of coverage will surely relieve a lot of the financial burden and we definitely commend you for trying to do the right thing.

OK (**CLIENT**), let's see if you qualify... I will ask you a few health questions, figure out your budget and do my best to get you approved over the phone and have your policy in the mail.

I believe I know the answer, but do you currently reside in a nursing home?

Have you had any major health problems in the past two years like cancer, heart attack, stroke, etc.?

We have found that most Seniors your age have a comfortable budget anywhere between 1 dollar and 4 dollars a day. Your budget also probably falls in this bracket. If so, please share with me what you are comfortable with \$1-\$4 a day?

Ok, Great. I will enter this info and see what major carrier may be the best option for you, both in coverage and of course premium.

First, let's get the health questions answered so underwriting can go to work for us...

(complete application process)
