

A-3 RW Script

Hello (first name of client) this is (your name) with the Mortgage Protection Group.

The reason I'm calling is because I've been asked to do a follow up on a form that you had filled out quite some time ago. It may have been 12 to 18 months ago. You had filled out this form requesting information on mortgage protection coverage after you closed on your loan for (state the amount that is on the lead) that you closed back in (state the month and year on the lead). Do you remember filling out that form?

(This is where you may have to describe the form. "It was a notice that was mailed to you about coverage to pay your mortgage in the event of a death or disability. You had written down your name, date of birth, height and weight, and whether or not you were a smoker.") **THEY NEED TO CONFIRM THAT THEY REMEMBER**

Once again I've been asked to investigate this because our records show that you did not put any coverage in place. We've had some cases where some folks were never contacted and we want to be sure that everyone who sent these forms in had an opportunity to take care of this important matter.

(At this point you need to start asking questions. "Were you ever called about this? Did anyone ever come out to see you about this? Were they able to help you get this taken care of?" If they say yes ask why they did not apply for coverage. If it was because it was too expensive say that we have some new programs that may fit their budget. If they say nobody ever called then move right in to set the appointment)

I'm going to be out in your area on (whatever day) taking care of a few other homeowners and I didn't know if it was best for you in the morning, afternoon or evening.

(Now just finish up with the rest of the tie-down and book the appointment)

THE KEY TO SUCCESS IS ALL IN YOUR TONE AND DELIVERY. YOU NEED TO BE SLOW AND VERY DELIBERATE. VERY MATTER OF FACT.