**Final Expense Phone Script**

Hello, \_\_\_\_\_\_\_\_\_\_\_\_\_\_, this is \_\_\_\_\_\_ with the Senior Care Center. I’m calling you about that information you requested (a postcard that you sent in) regarding your Final Expense benefits, does that ring a bell?

Great! Now, I’m just calling today to connect with you and get some basic background information so I can figure out which plans you’ll qualify for and then we’ll arrange a time for me to get this information to you. Does that make sense?

Great! Then the first question I’d like to ask is: what prompted you to send the request in? Why is this important to you at this time?

Ok, so what you’re saying is… (repeat their reason)

Great! Now, I have your address down as \_\_\_\_\_\_ and your age is\_\_\_\_, is that correct?

Good. And do either one of you use tobacco in any form?

Have either of you been in the hospital for anything in the last ten years?

Is there anything else with your health that we would need to know about (cancer, strokes, diabetes, copd, high blood pressure)

And, if I might ask, who is going to be the primary person taking care of funeral arrangements for you?

Now, it only takes about 15 minutes to go over what you qualify for. I’m scheduled to be in your area on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(day). Which would be better for you, morning or afternoon? I have a \_\_\_\_\_\_or \_\_\_\_\_\_ available, which time is better for you and (spouse’s name )?

What is the best way to get there from (nearest main intersection)? Great! What time did we say again (act like you didn’t write it down)? Just so you know, I will be coming from another appointment and sometimes I might be running late so please give me about 30 minutes on either side of that time. Ok, I will be there on (day & time) and if you have any questions feel free to call me at \_\_\_\_\_\_. (if married), again, please make sure that your spouse is there also. Thanks, have a great night!