

Life Insurance Script

YOU SAY:

Hello, my name is *(your name)* with PhoneOps Life Division. May I speak to *(person's name)*? *(Wait until the person is on the phone).*

YOU SAY:

I sent you an email in regards to Life Insurance earlier today, did you receive that email? *(Wait for a response and move on to one of the Pink Messages, 2nd Pink message is on page 2)*

If email was NOT received, say the following:

Oh, ok. Well I sent an email stating that I received your request online in regards to life insurance protection in the event of a death or disability.

So I'm calling to let you know that you may qualify for this protection. Do you prefer Term Life *(medical questions but no exam)* or do you prefer Whole Life *(medical questions and full exam)* *(Wait for a response)*

(You can read the benefits of Term Life or Whole Life if the Potential Client is not sure or skeptical. <https://www.PhoneOps.com/TermLife.pdf> or <https://www.PhoneOps.com/WholeLife.pdf>)

I can complete the application with you over the phone. Do you have at least 5-10 minutes for completion? *(Wait for a response and move on to one of the Yellow Messages)*

If yes:

You will need to go to:

<https://www.phoneopsfunding.com/InsurancePlans> and either click on Term Life or Whole Life depending on which one the Potential Client want to complete the application with the Potential Client over the phone.

If No, Say the following:

Ok, what would be a good day & time I should call back? *(Schedule a day & time, put in your notebook and remember to contact the Potential Client on the scheduled day & time).*

Life Insurance Script - Continues

If email was received, say the following:

Awesome, I'm glad you received my email. Life Insurance Protection will protect you and your family in the event something was to happen to you.

Filling out that form was the first step needed for me to contact you. I have your information as *(read to Potential Client the details that's on the lead you purchase making sure everything is correct)*.

(You can read the benefits of Term Life or Whole Life if the Potential Client is not sure or skeptical. <https://www.PhoneOps.com/TermLife.pdf> or <https://www.PhoneOps.com/WholeLife.pdf>)

I can complete the application with you over the phone. Do you have at least 5-10 minutes for completion? *(Wait for a response and move on to one of the **Yellow Messages**)*

If yes:

<https://www.phoneopsfunding.com/InsurancePlans> and either click on **Term Life** or **Whole Life** depending on which one the Potential Client want to complete the application with the Potential Client over the phone.

If No, Say the following:

Ok, what would be a good day & time I should call back? *(Schedule a day & time, put in your notebook and remember to contact the Potential Client on the scheduled day & time)*

Remember To inform the Potential Client to email you the following documents:

- Driver's License
- Voided Check
- Recent Utility Bill

You will need to upload these documents to the online application for completion.