

Mortgage Protection Script

YOU SAY:

Hello, my name is *(your name)* with PhoneOps Mortgage Protection Depart. 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 Mortgage Protection 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 in the mail in regards to paying off your home in the event of a death or disability.

So I'm calling to let you know that you qualify for this protection. Mortgage Protection will definitely protect you and your family in the event something was to happen to you. Basically, this protection will be the length of your remaining mortgage and at the end of your term; you'll get a Return of Premium Check back to you if you happen to outlive the policy so this is a win-win. Most people look at it as retirement money or savings.

(You can read the benefits of Mortgage Protection if the Potential Client is not sure or skeptical. <https://www.PhoneOps.com/MortgageProtection.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/Protection> to complete the application with the Potential Client over the phone. Confirm the information that's on the lead prior to completing the app.

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).*

Mortgage Protection Script - Continues

If email was received, say the following:

Awesome, I'm glad you received my email. Mortgage Protection will protect you and your family in the event something was to happen to you. Basically, this protection will be the length of your remaining mortgage and at the end of your term; you'll get a Return of Premium Check back to you if you happen to outlive the policy so this is a win-win. Most people look at it as retirement money or savings.

(You can read the benefits of Mortgage Protection if the Potential Client is not sure or skeptical. <https://www.PhoneOps.com/MortgageProtection.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/Protection> to complete the application with the Potential Client over the phone. Confirm the information that's on the lead prior to completing the app.

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.