



Final Expense Appointment Script

Agent: Hi Mr./Mrs. _____, this is _____ with _____. How are you doing today?

Client: I am doing well.

Agent: Mr./Mrs. _____ the reason I stopped by today is that we mailed out a little white card a few weeks ago on our new State Regulated Burial Policy to help take care of your funeral expenses. Do you remember seeing that card? (Pause for a second to give them an opportunity to tell you that they remember seeing it).

Scenario 1:

Client: Yeah, I remember that card.

Agent: That's great. I am a local insurance agent here in _____ County and to my knowledge, none of our agents have been by to see you. I was in the area dropping the same information off to some other folks who have requested it. If you have a few minutes, I would be glad to go over the details with you.

We can sit right here on the porch if you'd like...

Or

Do you have a table we could sit at to discuss...?

Scenario 2:

Client: No, I don't remember seeing that card.

Agent: Well, Mr./Mrs. _____ I apologize for the confusion. It may have been something you or one of your relatives may have sent in a while back. Just to be sure, can you confirm your DOB is _____ ok, great.

Agent: Since I am already in the neighborhood, I would be glad to go over the information with you. It will only take a few minutes.

Client: I don't have time right now.

Agent: No problem. I know I just dropped by without giving you a call. Would it be easier if I scheduled another time to come by later this week?

**If yes, schedule another time to come by and try again*

**Make sure you talk slowly and clear since we are dealing with Seniors.*