



## INTERNET LEAD ZOOM PHONE SCRIPT

Hello [CLIENT NAME], my name is [YOUR NAME]. I hope you are doing well today.

I'm getting back to you about the form you filled out a little while ago online requesting information on life insurance protection. I'm the field underwriter that has been assigned to get the information out to you, but I just need to verify some of the information you put down.

Looks like you put down your birthday as \_\_\_\_, Correct? And you wanted the information delivered to [ADDRESS]?

Perfect, my job as your field underwriter is very simple. We work with a variety of prestigious companies, and what I do is simply assess your current insurance needs, present you with a few personalized options to choose from and then take you through the qualification process. Everything is very straightforward, easy to understand and does not take long at all.

With everything going on in the world we are running a little behind as we have more requests than field underwriters currently, so I'm going to make some notes quickly to ensure we set a time that works for both of us.

Are you currently working or retired? What time do you typically get home from work? Are you married or single? [IF MARRIED] Are they working and if so, what time do they get home from work?

Now, we used to meet with everyone in-person but with this on-going pandemic, for safety reasons we are now conducting these meetings through Zoom Video. However, we will still do at-home visits upon request. Are you familiar with Zoom and which option would you prefer?

Currently my schedule is very tight. However, I can squeeze you in after my appointment today at [TIME] for [DAY AND TIME] or we can do [DAY AND TIME], what time works better for you? Okay, I will put you down for then.

I have your email address as \_\_\_\_\_, is that the one you want me to send the Zoom link too? Okay and is this your cell phone? Perfect, after we get off the phone, I'm going email you the link and I'll also text you so that you have my number heaven forbid something changes. Just do me a favor and when you get my text just shoot back and a Thumbs-Up or your favorite emoji so I know it was received.

Great... Well [CLIENT NAME] I have you scheduled on [DAY] at [TIME] and I look forward to meeting with you then. Have a great day!