



Final Expense Phone Script

Hello_____. This is_____, and I'm calling you back about that postcard you sent in about the Life Insurance Programs for Final Expenses. I'm just the caseworker that's been assigned to your request and several others in your county. My main job is to get some options together for you, and before I can go to work on your case, I just need to verify what you indicated on the postcard.

You put down your age as _____

And are you a non-smoker? _____

Okay, any major health issues I should be aware of like any cancer, heart attack or stroke? _____

Okay, any diabetes or COPD? _____

Great, sounds like you will qualify for several of our programs. I've got enough information on my end to go to work on your case. The reason I am calling you is I'm already scheduled to be out in your area on _____. I'll be taking care of several of these requests so I'm not going to have a lot of time, but it only takes about 15 minutes to go over the coverage options with you. I'd like to try and squeeze you in since I'll be out in your area anyway. What time of day typically works better for you, morning, afternoon, or evening?

[Schedule]

[Tie Down]

Client Qualification Information

General Information

Client

Name _____

Birthday _____ Age _____

Height _____ Weight _____

Smoker _____

Spouse/Other

Name _____

Birthday _____ Age _____

Height _____ Weight _____

Smoker _____

Medical Problems

(High Blood Pressure, Heart Attack, Stroke, Cancer, Diabetes, High Cholesterol, DUI/Substance Abuse, Any Surgeries or Diseases, Accidents in the Past 10 Years)

Client

Spouse/Other

Medications

Client

Spouse/Other

Occupational Information

Client

Occupation _____

Do you have life insurance? Y ___ N ___

If yes, how much coverage? \$ _____

Spouse/Other

Occupation _____

Do you have life insurance? Y ___ N ___

If yes, how much coverage? \$ _____

Primary Concern

What do you want this coverage to do for you?

What made you want to send this form back to us?

