



## B.E.S.T. SYSTEM

**3 BE BUSY.** Pick up the phone! This is a simple numbers game: the more dials you make, the more appointments you set and the more families you help. Most successful agents make 250 or more per week.

**3 ESTABLISH** the reason why you are calling. You're calling because they sent something to you!

*Hello, \_\_\_\_\_. My name is \_\_\_\_\_. I'm calling about your mortgage in the amount of \$\_\_\_\_\_ with \_\_\_\_\_ bank. I was just getting back to you about that letter you sent in regarding the mortgage protection coverage, do you remember that? Ok, let me just verify some of the information you provided so we can work up several options for you."* (Start filling out client qualification form.)

1. You put down that your DOB is \_\_\_\_\_, your height is \_\_\_\_\_, and your weight is \_\_\_\_\_. (Spouse's) DOB is \_\_\_\_\_ height is \_\_\_\_\_, and weight is \_\_\_\_\_.
2. You indicated that neither of you use tobacco products in any form, is that correct? Do you plan on starting to use tobacco products?
3. Do you or (spouse) have any medical problems that I need to know about? Such as HBP, diabetes, cancer, heart attack, high cholesterol, COPD, etc?
4. Are you or (spouse) taking any medication for anything at this time? Have either of you been admitted to the hospital in the past 10 years?
5. What do you do for work? What about (spouse)? What is your typical work schedule?
6. On the letter, it says the amount of the mortgage to be covered is \$\_\_\_\_\_, is this correct? What is your monthly payment?
7. Most importantly, when you sent in the form, who were you looking to protect? Was it mostly for coverage on you, (spouse) or both?

## 3 SET APPOINTMENT.

*Ok, it takes about 15 minutes to see what coverage you'll qualify for. I have a handful of homeowners to see in your area tomorrow and I have a \_\_\_\_\_ or \_\_\_\_\_ appointment available. What is the best time for you and (spouse)?"*

*"I'm going to put you down for \_\_\_\_\_. Can you grab something to write with?"*

## 3 TIE DOWN.

*"I need you to write down a few things that you'll need to have out when I arrive. This will help speed up the whole process.*

1. I need your Doctor's name/address/phone # for both you and (spouse). (Spouse) will be there for the appointment, right?
2. I need any medications that either of you are taking out on the table, if you don't mind.
3. I'll need a picture ID for both of you. A driver's license is fine.

*That should be all I need. What time did I say again? Ok, if you could write down that time at the top of your paper as I will be there tomorrow night. Please give me a 15 or 20 minute window on either side of that time since I'll be meeting with other homeowners in your area too. If I plug your address into my GPS, will it take me right to your home? See you tomorrow!"*

# CLIENT QUALIFICATION INFORMATION

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Smoker: \_\_\_\_\_

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)

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## MEDICATIONS

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## MORTGAGE INFORMATION

Loan Amount: \_\_\_\_\_

Lender: \_\_\_\_\_

Mortgage Term: \_\_\_\_\_

Monthly Payment: \_\_\_\_\_

## MISCELLANEOUS

Occupation: \_\_\_\_\_

Occupation: \_\_\_\_\_

Schedule: \_\_\_\_\_

Schedule: \_\_\_\_\_

Beneficiary Full Name & Relationship: \_\_\_\_\_

Do you have children? Yes: \_\_\_ No: \_\_\_ If yes, their ages: \_\_\_\_\_

Appointment Date & Time: \_\_\_\_\_

Directions to Home: \_\_\_\_\_