

TEXTING SCRIPTS

Initial Text: Send this when you call the lead and they do not answer.

My name is _(Your Name_, the Field Underwriter assigned to you regarding the Mortgage Protection Insurance. We haven't gone over it with you yet, (you received a notice that you called in about recently OR you received a phone call from our office recently and used the code word ____ OR you sent us back paperwork regarding your mortgage protection).

!!NOTE FOR AGENTS: THE LAST PART DEPENDS ON THE TYPE OF LEAD YOU ARE WORKING WITH!!

They have me scheduled to go over that with you by phone later today within the time windows below, (keep in mind I'll be calling some time within that time window since I'll have another family to speak to before you, but it will not take up that whole time). If you have a spouse or significant other, we would need both of you on the phone and for you to have access to email since I'll be sending over important information.

Today, Wednesday 2/12

1:30-2:00

4:00-4:30

5:00-6:00

Please text or call to confirm which option works best for you for a 10-15 minute call.

Kindly,

(Your Name)

Field Underwriter

Follow-up Text: The next morning

Good morning!

I don't know if you've been getting any of my messages regarding the Mortgage Protection Insurance file. I do need to get this closed out, (my boss keeps checking in). Luckily, it won't take too long to review! Would this afternoon or evening work better for a 10-15 minute phone call?

These are my remaining spots for today:

2:30-3:00

4:00-4:30

5:00-6:00

Kindly,

(Your Name),

Field Underwriter

- Mortgage Protection

- Loan Protection Insurance

- Annuities

- Retirement Solutions

- Final Expense and Burial Insurance

Final Notice text: Within 3-4 days after the follow-up text

FINAL NOTICE

I am showing that we have not gone over the information with you on the state regulated Mortgage Protection Insurance Plan. You are entitled to receive the information whenever there is a loan against your property, to prevent foreclosure in the case of illness or death. Since we haven't heard back, I will unfortunately have to close your file by the end of business today if I don't hear from you.

My remaining times are:

2:30-3:00

4:30-5:00

5:00-5:30

All my best,

(Your Name)

Field Underwriter