

**(Make sure you have a proper opening story. Introduce yourself and the company you represent right away.)**

Hi, can I speak with Mr./Mrs./Ms., please? This is a call from ABC Life Insurance! How are you today?

**Explain the call's purpose and give them a summary of what you may be able to do to help them. Also, test the level of interest by wearing tri-flavored clothes such as "So when would be the best time to have them call you tomorrow to talk about life insurance?"**)

The reason for this call is to inform you that we have agents in your area offering free, no-obligation quotes on life insurance. Would you like to see if you qualify for our program? We are providing families like yours with an innovative solution with their life insurance planning. When is an enjoyable time to have one of our agents give you a call tomorrow?

#### **Rebuttals:**

- It is never too early or too late to secure your future for your family and your retirement.
- It is just a quick call and there is absolutely no commitment for you to buy.
- If you already have a life insurance plan, no problem, but we would still like to give you the chance to compare rates.

#### **Collect Information**

I just need to ask you some questions to make sure you qualify for the program. Then I can either transfer you to one of our specialists or set an appointment to have them call you back at a time of convenience.

#### **Mandatory Questions:**

1. May I know your age?
2. Approximate annual income?
3. Have you ever been seriously ill, such as cancer, heart attack, or stroke?
4. Are you currently taking any prescription medicines?
5. Do you already have a life insurance policy? (If yes, with whom?)

**Live Transfer:** Okay, that is all for now. Please hold on while I connect you with our loan specialist.

**Next Day Appointment:** Okay, that is all for now. So, when is an enjoyable time to have our loan specialist call you tomorrow?

**(When setting an appointment, make sure to remind them of the date and time to finish the call strongly.)** Thank you, have a wonderful day, and please do not forget our appointment tomorrow at 10:30 AM.