

Mortgage Protection Appointment Setting Scrip

[Agent's Introduction]

Agent: Hi, [Borrower's Name], this is [Your Name] from Legacy. How are you doing today?

Borrower: [Responds]

Agent: That's great to hear. I'm reaching out because you recently requested more information about our mortgage protection program. I have your request form here, and I wanted to make sure we provide you with the detailed information you're looking for. Is this a good time to talk briefly?

Borrower: [Responds]

[Engaging the Borrower]

Agent: Excellent. I see that you have a mortgage with [Mortgage Lender] for [\$Mortgage Amount], and you indicated that [Spouse/Partner's Name] is also on the mortgage. Is that correct?

Borrower: [Responds]

Agent: Perfect. One of the key benefits of our mortgage protection program is ensuring that your home is secure for your family in case anything unexpected happens. This can provide peace of mind knowing that your mortgage payments are taken care of.

[Building Trust and Understanding Needs]

Agent: Before we go any further, can I ask a few quick questions to better understand your situation and provide you with the most relevant information?

Borrower: Sure.

Agent: Great. You mentioned that you [do/do not] use tobacco. Is that correct?

Borrower: [Responds]

Agent: Thanks for confirming that. Understanding your health and lifestyle helps us find the best protection plan for you. Additionally, when would be the best time of day for both you and [Spouse/Partner's Name] to meet? It's important that both of you are present so I can address any questions you both might have and ensure that the plan fits both of your needs.

Borrower: [Responds with preferred times]

[Scheduling the Appointment]

Agent: Excellent. I have availability for a face-to-face meeting or a Zoom call on [Day] at [Time] or [Alternate Day] at [Alternate Time]. Which one of these works best for you and [Spouse/Partner's Name]?

Borrower: [Chooses a time]

Agent: Wonderful. I'll mark you down for [Day] at [Time]. I'll send you a confirmation email/text with all the details. If face-to-face, (Can I confirm your address is [Borrower's Address]?)

Borrower: [Confirms]

Agent: Perfect. During our meeting, we'll go over how the mortgage protection plan works, answer any questions you have, and find the best way to ensure your home is protected. Does that sound good?

Borrower: [Responds]

[Closing the Call]

Agent: Great! I look forward to speaking with both of you on [Day] at [Time]. If you have any questions before then, please feel free to reach out to me at [Your Phone Number]. Have a wonderful day!

Borrower: Thank you, [Your Name]. See you then.

Agent: Thank you, [Borrower's Name]. Goodbye!