

Final Expense Appointment Script – Gather Basic Info

Hello, may I speak with Mr. or Mrs. _____. My Name is _____.

I'm calling from _____. I'm calling regarding a FREE QUOTATION for final expense insurance that we are providing clients in our area.

Our plans can save you 15,000 to 50,000 dollars on your funeral expenses and any outstanding debts you may leave behind.

(since final expense insurance is not a popular product they may not know what final expense is and may ask...)

“WHAT IS FINAL EXPENSE?” Final Expense is a miniature life insurance policy that covers any outstanding bills and burial expenses that you may leave behind. That way your family doesn't get stuck with the bills.

(At this point, the customer may start to give out objections or ask questions. Rebuttals come very handy, when you deliver your rebuttals, you have to sound very confident)

The process itself is painless and quite simple and the plans are very affordable. In just a few minutes we will show you all your options and discuss what fits best for you and your loved ones.

This should take only 15 minutes or so and can be done in person or online in a virtual meeting.

Take a peek at your calendar. I have availability on “day” or “day” at “time”. Which works better for you? Great.

Alright. I need you to grab a pen and paper and jot this down. Let me know when you are ready. Okay. You will be meeting with “your name” on “day” at “time”. Please be sure both you and your spouse are there.

Before you go, I need to verify some very basic information for our upcoming meeting.

1. Verify name
2. Husband age, wife age
3. Do you smoke, does your wife/husband smoke?
4. Do you have any serious medical conditions?
5. Verify the address

Perfect. We look forward to seeing you soon. Thank you.