

CALL IN LEAD

Hi, _____, I'm glad I got a hold of you.

This is Jim; I am just giving you a quick call regarding your _____ mortgage you just closed over there on _____.

I am giving you a quick call, we had sent out an urgent letter to you that had a mortgage ID number that ended in _____ for you to call in to our automated line and verify some of your information.

I'm actually a field underwriter that was assigned to get you the mortgage protection information I just need to verify some of the information you provided.

I am sorry to make this a 2 step process.

I have your age as _____.

Is there a co-borrower or a spouse?

You are a non-smoker/smoker?

You said you DO/DO NOT have a history of heart attack, stroke, cancer or diabetes?

Ok, my job is to get this information out to you; I am required to get this information to you and get this file closed.

It takes about 15 - 20 minutes.

They have me scheduled in your area on _____ & _____.

Which day works for you?

I have an opening on _____ at _____ or _____.

Ok, what I am going to do is set you up on _____ at _____.

I need to give you a special code number for the meeting to identify me.

_____ And If you could do me a big favor, if you are anything like me, if I don't write things down I don't remember if you could put that on your calendar.