**Mortgage Protection Appointment Setting Script**

Hi. Is this \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Hi \_\_\_\_\_\_\_\_\_\_\_\_\_\_ I’m glad I got a hold of you.

This is (Your Name), I’m calling in regards to your loan with \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

I am the field underwriter who was assigned your paperwork.

You (or your Husband/Wife) had mailed in a request for information about protecting your mortgage in the event of death or disability.

You listed your date of birth as\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and you are a non-smoker (smoker) is that correct?

And\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Confirm spouse DOB & smoking status) is that correct?

Any health issues such as cancer, heart attack, stroke, diabetes, or hepatitis C?

Ok, and do you work full time?

Ok, like I said, I’m the field underwriter who goes over the information with you, and my company has me out in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ County on \_\_\_\_\_\_\_\_\_\_\_\_. This will only take about 20 minutes. My goal is to work when you don’t so is morning, afternoon, or evening better for you?

I have an opening on \_\_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_ or\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Which will work best for you?

Ok, I’m going to put you down for \_\_\_\_\_\_\_\_\_\_\_\_\_\_ at\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Like I said, it will only take about 20 minutes.

I’ll have some questions for you, show you your options, and what you do with it is totally up to you, Ok?

If you could do me a big favor. If you’re anything like me, if I don’t write things down, I don’t remember.

If you could put on your calendar that I’ll be there on\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Ok, thank you for your time. I’ll see you on \_\_\_\_\_\_\_\_\_\_\_\_\_\_ at\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_