



Final Expense Mastery

APPOINTMENT SETTING

APPOINTMENT SETTING SCRIPT

“Hey, is this Mary? Hey Mary, this is Holden -- how are you doing today? Good! Well Mary the reason I’m calling you is because you sent a postcard back into our office requesting information about the state regulated final expense programs. I’m not sure if you remember that, but my job is real simple, I just confirm the information you wrote on here. Do you remember that card? (Pause, let them answer, whether they say Yes or No, follow the script!)

Ok perfect, like I said, my job is to just confirm the information. Now, you wrote your age as 68, is that correct? Ok, great and you wrote your husband, John Smith as 71, is that correct? Perfect, and you wrote the address down as 1515 Main Street Apt B in Garland Texas 75041, is that correct?

(If you have appointments and need to lock down the remaining spots)

Ok great, so the reason I am calling is because I am going to be on Main street tomorrow around 10:00AM and I was wondering if there is any reason you and Mr. John wouldn’t be home around that time. You will be, perfect! Is there any code I need for the gate?

OR (If have no appointments and trying to fill schedule)



Final Expense Mastery

I'm calling you because I'm going to be out there tomorrow and was just wondering what a good time would be for me to get you this information out to you...it will only take a couple minutes of your time...is morning or afternoon usually better? Morning, great Mary, I'll see you and John tomorrow between 10:00AM and 11:00AM and I'll be driving a silver sedan.

TIPS:

- The key thing is to really listen to them and be engaged in the conversation when you ask them how they are doing. If you can get them to laugh right off the bat with a response, that is one foot in the right direction. Do not be like a telemarketer reading a script, have some personality and make them smile!
- **DO NOT EVER PAUSE** in the first paragraph when you say you need to confirm the information they wrote on the card and once you say they wrote their age as "68", not pausing will prevent a lot of people who will tell you they didn't send anything in, or they will ask "What's this all about?" if you pause and allow them to think. But once you confirm their information correctly, they automatically assume they did fill it out, which they definitely did, you have it with their handwriting on it!
- In the example, you noticed how I confirmed that their spouse was going to be there as well and all his information quickly without pausing.
- Always asking if there is a gate code is helpful to get into these communities.
- Remember, this is a short and sweet appointment setting process. Keep it vague and do NOT go into detail. No asking about banking information, health questions, if they have insurance etc. **Short and**



Final Expense Mastery

sweet, sell when you get there.

- Always remind them that you don't collect any money or anything along those lines.

COMMON OBJECTIONS AND REBUTTALS

WHAT WAS THIS ABOUT AGAIN?

Mary, this is about the card you filled out regarding the state regulated final expenses programs, whenever someone fills this out, I just verify the information they wrote on here to get you out the information that YOU requested.

I ALREADY HAVE INSURANCE

GREAT! You actually have to have insurance to qualify for many of these programs. Since you filled this card out, I just have to go over this with you real quick. It just takes a few minutes and I'll put together all the information this evening to get it out to you tomorrow. Is morning or afternoon better? (loop back around and ask for the appointment again)

I'M NOT INTERESTED

That's ok, since you filled this card out, I have to drop this off real quick and go over it with you. It just takes a few minutes of your time. Is morning or afternoon better?



Final Expense Mastery

I'M BUSY ALL DAY

Usually, this means they have a doctor's appointment or have to run to the grocery store. Our clients plan a whole day to do something for an hour or so.

Make sure you ask the right questions to get on the same page with them. "Mrs. Mary, I completely understand, I am busy non-stop all day and my boss is always on my back... do you have a doctor's appointment or something tomorrow? You do, ok perfect, what time is that at? 10AM, no problem, I actually have a couple people to see during the day but am going to be back on main street in the afternoon is 4:00PM or 6:00PM, better?"

I CAN'T AFFORD IT

No worries, whenever someone fills this card out, I'm just supposed to go over this real quick and I don't collect any money or anything along those lines. It just takes a couple minutes and what I'll do is put together all the information this evening and get it on out to you tomorrow. Is 10:00AM or 2:00PM better for you?

IS THIS SOMETHING FOR FREE?

Absolutely, I actually don't collect any money or anything along those lines, my jobs just to get out the free information and show you what you qualify for. It just takes a couple minutes of your time. Is 10:00AM or



Final Expense Mastery

2:00PM better for you?