

# Telesales Script for TV and Live Transfers

Hello **Mary**, my name is (YOUR NAME). I am an agent here with Senior Life. How are you doing today? Great. Okay, give me a minute while I pull up your information that was sent to me.

Did you want this coverage for yourself or a loved one? Ok, great yourself, now I have your DATE OF BIRTH as (SAY DATE OF BIRTH), correct? And your in (CITY THEY ARE IN)?

Okay, **Mary**, we do not do any medical exams; I'm just going to ask a few basic health questions to get you the best rate; then I'll go over the features and benefits and a few different protection amounts; sound good?

Now before we get started *(lower tone)*, let me ask what prompted you to call in today?

*( if you don't get a solid answer, do you not have any coverage, and do you want to make sure your final expenses are covered so that you're not leaving a financial burden on your family?)*

Ok, Mary, I can definitely help you with that...*(continue with health questions)*

Have you been hospitalized two or more times for anything significant in the past ten years?

Any history of stroke or cancer?

Any form of tobacco or nicotine use?

Mary, what is your height and weight?

And last, what type of prescription medications do you take?

Okay, **Mary**, you **MAY** qualify for one of our plans here. Before I go over the features and benefits, let me ask *(lower tone)* What are your final wishes? Do you prefer traditional burial or cremation? *(this will determine how you will explain legacy and also how much coverage they need to cover their funeral)*

And who will be in charge of that for you? Who would be the beneficiary?

Okay, **Mary**...

This plan is whole life; you are guaranteed protection for the rest of your life

The premium is locked in, so it will never increase, and the benefits will never decrease  
Accidental is included so that the face amount would double in the event of an  
accident

***(If super preferred, preferred, or standard, talk about the immediate coverage,  
coverage from day one)***

And **Mary**, the policy will also build cash value, so down the road, if you ever needed  
to borrow from your policy, you would be able to do that.

**Mary**, your policy also includes membership to our sister company Legacy Assurance.  
Legacy Assurance is a company committed to reducing the financial and emotional  
burden of planning your funeral. We will provide **(CHILD's NAME)** with an advocate,  
someone to step in and take that emotional burden off them. We will directly deal with  
the funeral home and negotiate everything.

You're also able to lock in your merchandise at a wholesale rate. We have over 250  
caskets to choose from, and they are locked in at \$2000. Burial vaults locked in at  
\$750 and Headstones and Monuments at \$850.

With funeral costs on average around 10-15K, we can cut the price closer to around  
6-7k saving your family thousands of dollars and leaving them more money behind.

With this membership, we can also add up to 4 family members at no additional cost;  
they would have access to these same benefits.

Okay, **Mary**, let's go over a few different protection amounts, and you let me know  
what's comfortable for you or what fits your budget.

I have a 10k which would double to 20k in the event of an accident, for \$60 a month.

I have a 15K, which would double to 30k for \$80 a month.

I have 20k, which would double 40k for \$100 a month.

Now **Mary**, which plan sounds comfortable to you? I can also customize it to  
something a little more affordable? Having something in place is better than having no  
coverage at all, wouldn't you agree?

***( if they choose a plan, great, if not, keep going)***

Okay, **Mary**, well, while you think that over let me get some additional information to  
finish getting you qualified. ***( start filling out the app in this order...)***

**Mary**, we will put your daughter Sally down as the Primary beneficiary, correct?

Okay, let me verify your mailing address to where we will be mailing this out. ***(skip over social get that last)***

For your security question on the policy, what was your mother's maiden name?

Now let me review some health questions with you...***( these will be on the recording, you can summarize them here but will have to be read verbatim on the recording)***

Whom can we list as your primary doctor?

And Mary, what is your social? ***(ask with confidence, if they refuse, get the last 4)***

Okay, Mary, now we set this up through our bank service plan. Once the application is approved and the first payment is drafted, you will get your policy in the mail within 7-10 business days. Are we going to be using a checking or savings account? Whom do you bank with? ***(SAY BANK NAME)***, ok, perfect, now I can locate the routing number; what is your account number? ***YOU MUST ASK ACCOUNT NUMBER WITH NO HESITATION!!!!***

***(assume the FIRST DRAFT IS ASAP unless they say otherwise)***

When would you want all your future payments drafted, at the beginning, middle, or end of every month?

Now, Mary, the last thing we need to do is get a quick voice verification; this is where I have to read through the application, ask you those health questions that we reviewed, and you will answer by saying yes or no. Okay?

***( After recording, a script check will come back, call your manager the first few times to assist with this, depending on what comes back on the script check, it may change the plan)***

***(warm down with the client, ask if she has any questions, give her your contact information)***

Now **Mary**, if you have any questions at all, please give me a call! Here is my direct phone number.

***(DONT SKIP THIS PART—>Get Referrals )*** Now Mary, who else do you know that will benefit from hearing this information so I can share it with them?