



You have a CUSTOMER REQUEST that needs a call ASAP!

The client below has provided and confirmed the following information and has requested an agent call them for further information regarding **Mortgage Protection** coverage within 24 hours.

How was this lead generated?

The client received a postcard in the mail regarding their mortgage and per the instructions called the phone number on the post card. They listened to a brief message that says: _____, when your loan with _____ closed on _____, you were entitled to receive information regarding mortgage protection that would pay off your mortgage in case of a death, or make your monthly payments if you are disabled and can't work. You are entitled to receive this information, but company records show that you have not. In order for us to provide you with this information, we need to ask you a few brief questions. Using the buttons on your phone please enter your age. Please tell us your gender. Do you have a co-borrower on this mortgage? Thank you for your time, a company representative will be contacting you shortly to go over our mortgage protection options. Have a great day.

To hear a live example of this call please dial 1-800-230-8750 and enter the mortgage ID 0012-080-001

What should you say when you call them?

Always make sure you are speaking with the client named on the lead as they would be the one who called in.

"Hey ____? My name is _____. I'm calling about your mortgage in the amount of \$_____ with _____ bank. I'm getting back to you about the postcard you received in the mail regarding your mortgage. You called the number and followed the phone prompts to answer a few questions so that we could contact you back regarding your mortgage protection options, do you remember that? Ok, let me just verify some of the information you provided so we can work up several options for you." And continue with the B.E.S.T. Phone Script.

First Name:	Kelly	Mortgage ID:	2134157000
Last Name:	Clubb	Contact Phone:	1-785-554-5363
Property Address:	1916 SE 24th St	Caller ID:	7855545363
City:	Topeka	Age:	
County:	Shawnee	Purchase Amount:	
State:	KS	Mortgage Amount:	\$53,000.00
Postal Code:	66605	Lender Name:	

Questions Asked

What is your gender?: Female

Have you used tobacco in the last 12 months?: Y

Do you have a co-borrower on this mortgage?: N