



UNITED LEAD NETWORK
EXCLUSIVE LEADS PROVIDER

Mortgage Protection Script

Hi, can I please speak with _____ (FIRST NAME).

(FIRST NAME) _____ my name is AGENT NAME.

How are you doing?

I just want to let you know that I'm responding to the pink form you sent to my office regarding your \$_____ mortgage. It was in regards to mortgage protection on that loan. Do you remember filling out that form? NO – Explain further and perhaps your spouse filled out the form. YES – Great, I just need to confirm a couple of things and ask you some other basic questions to see if you qualify and we can be of service to you. Is now a good time? (WAIT FOR THEM TO ANSWER) TAKEAWAY

– Thanks and we won't be more than a couple minutes, I just need to verify a few things...

Your Lender _____ TOTAL MORTGAGE _____

Monthly Mortgage Payment _____

Mortgage Term _____ (INSERT TAKEAWAY)

Your Occupation/Duties _____

Spouse Occupation/Duties _____

(TAKEAWAY... DO THEY GIVE YOU RAISES EVERY YEAR?)

Any children _____

D.O.B _____ Spouse D.O.B. _____ ANY tobacco _____

Spouse ANY tobacco _____