



UNITED LEAD NETWORK
EXCLUSIVE LEADS PROVIDER

Mortgage Protection Lead Generation Sample

Introduction (For All Scenarios)

Hi, can I please speak with [Prospect's First Name]?

[Wait for response.]

My name is [Your Name] from [Company Name]. I'm following up because you recently inquired about **mortgage protection insurance** to ensure your home is covered in case of unexpected events. This protection could help pay off or reduce your mortgage balance if anything happens to you.

Before we proceed, I just need to ask you a few quick questions to better understand your needs and confirm some details.

Qualification Questions (For All Scenarios)

- 1. Full Name:**
Could you please confirm your full name?
- 2. Mortgage Details:**
 - Who is your lender?
 - What is the total mortgage balance on your home?
 - What is your monthly mortgage payment?
- 3. Mortgage Term:**
How many years are left on your mortgage?
- 4. Current Occupation:**
What do you do for a living, and what are your current job duties?
- 5. Spouse Information:**
 - Does your spouse have any tobacco use?
 - What is your spouse's occupation?
- 6. Children:**
Do you have any children you'd like to protect under this plan?

7. **Date of Birth:**

Could you confirm your date of birth for qualification purposes?

8. **Tobacco Use:**

Do you or your spouse currently use tobacco?

1. Callback Lead Handling (Mortgage Protection Insurance):

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over your mortgage protection options in more detail?

Step 2: Schedule a Callback

- When would be a convenient time for our licensed agent to call you back and discuss your mortgage protection needs?
 - **Morning**
 - **Afternoon**
 - **Evening**

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
 - **Full Name:**
 - **Mortgage Details:**
 - **Mortgage Term:**
 - **Occupation:**
 - **Spouse Information:**
 - **Children:**
 - **Date of Birth:**
 - **Tobacco Use:**

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] at [Scheduled Time]. Please expect the call, and thank you for your time!
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2. In-Person Appointment Handling (Mortgage Protection Insurance):

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed agents to go over your mortgage protection options and help you select the best plan for your home and family. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
 - **Option 1:** [Date/Time]
 - **Option 2:** [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
 - **Full Name:**
 - **Mortgage Details:**
 - **Mortgage Term:**
 - **Occupation:**
 - **Spouse Information:**
 - **Children:**
 - **Date of Birth:**
 - **Tobacco Use:**

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.

3. Live Transfer Handling (Mortgage Protection Insurance):

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed agents right now, who can walk you through the mortgage protection options available and help you secure the best coverage for your home. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - **Full Name:**
 - **Mortgage Details:**
 - **Mortgage Term:**
 - **Occupation:**
 - **Spouse Information:**
 - **Children:**

- **Date of Birth:**
- **Tobacco Use:**

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will review your options and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested:**

"I understand, but mortgage protection is a great way to ensure your home is paid off or reduced in case of an unexpected event. Would you be open to exploring some affordable options?"

- **Already Have Mortgage Protection:**

"That's great! Many of our clients already had coverage but found that newer plans offered more benefits at a lower cost. Would you like to compare your current plan with what we can offer?"

- **Can't Afford Insurance Right Now:**

"I understand. The good news is that we offer flexible mortgage protection plans that can fit within your budget. Would you be open to discussing those options?"

- **How Did You Get My Information?:**

"We usually receive information through online requests or databases that help homeowners find affordable mortgage protection insurance options."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name

2. Mortgage Details
 3. Mortgage Term
 4. Occupation
 5. Spouse Information
 6. Children
 7. Date of Birth
 8. Tobacco Use
 9. Next Steps (Callback, In-Person Appointment, or Live Transfer)
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Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best mortgage protection plan for your home and family. If you have any further questions, feel free to contact us at [Phone Number]. Have a great day!

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