

GENERIC INSURANCE VIDEO OR VOICE OVER SCRIPT - SHORT

Hello, I'm (Agent Name), your local <insert the product name here >.

My goal is to educate you on the risks and opportunities that exist as you age with <enter product name >.

There are many products that should be considered in the planning process, so speaking with an expert is crucial to understanding which products are right you.

Plan ahead and learn about the options available so you can make an informed decision.

Call me today <insert phone number > or visit me online at www.yourwebsite.com

GENERIC INSURANCE VIDEO OR VOICE OVER SCRIPT - LONG

Hello, I'm (Agent Name), your local < enter product name > agent. As an agent, I represent you, the client, to help you understand this complex issue.

With so many products on the market today, it is hard without an expert to know which products are right for you or your family.

Don't tackle this alone! My goal is to educate you, so you understand your risks and the choices you need to make.

Not all products and plans are right for everyone. However, speaking with an expert is crucial to understanding if it is right for you.

Before you are making decisions under pressure, explore the options available to you, and make an informed decision.

Call me today at < insert your phone number > and or visit me online at www.yourwebsite.com

FREE QUOTE

Hi [Lead Name], my name is [Agent Name], and I am from [Company].

I am informing you that our company offers free custom quotes on many policies. **Of course, you are not obligated to buy anything, this is to give you real, concrete data of the insurance options that are available to you and your family.**

Would this be of any interest to you?

- If the prospect says yes but does not have the time to discuss, you can offer to email and set an appointment for a later day.
- If the prospect is willing to continue the call, continue with your sales proposition.

FOR REFERRALS

Good morning/evening, am I speaking with [Lead Name]?

We haven't had a chance to talk beforehand, but [Mutual Contact] gave me your number and indicated that you may be interested in our insurance offering."

"[Mutual Contact] recently signed up with us for [Product] to make use of our [Benefit/Value] and they've been so happy that they wanted me to offer you the same thing.

Would you be interested in hearing more?"

FOLLOWING UP ON VOICEMAIL

Hello, Mr./Mrs./Miss [Lead Name].

My name is [Agent Name], and I am calling from [Company].

I am reaching out because you didn't respond to my previous voice message.

I understand you are busy and don't have much spare time, but it won't be a long conversation.

My only goal is ensure that you receive the information that you are looking for? I'm typically available [time frame].

Thank you, I look forward to hearing from you.

LONG TERM CARE INSURANCE CALL

Hi, Mr./Mrs. [Prospect Name], this is [Agent Name]. I am a licensed agent in long-term care licensed in the state of [State]. I have the inquiry you sent in asking for information about the long-term care plans.

The reason I'm calling is to see if long term care makes sense for you. Health is a big issue; this is not available to everyone. We need to get a few questions answered first.

1. I have your date of birth down as [Date of Birth]. Is that correct? (OR What is your date of birth? How about your wife/husband?)
2. Do either of you take any prescription drugs? What are they or if you don't know the names what do you take medicine for?
3. How tall are you? How much do you weigh?
4. Any hospital stays in the last 10 yrs? (if so, why?)
5. How about your wife/husband? (Ask ques. 2-4)
6. Do either of you smoke? Ever had cancer or diabetes?

Do you know much about long-term care? Have you ever looked at this before?

Most people that I speak with are really looking for 2 things – what the plans cover and how much they cost. Is that the case for you?

Well, there's a lot to know. This is not like any other kind of insurance where you have Plan A, B, or C. Here you have a huge number of options to choose from.

Understanding how to make the right choices for your needs and not overbuying the coverage is the most important thing.

Pause for 2 seconds

CLOSING THE APPOINTMENT

What I do is this. I am free & there is no obligation. We can schedule a telephone consultation. We will do a short online tutorial so you understand:

- How these policies work,
- What they cover.
- And then we compare all the major carriers, so you can see EXACTLY what all of them would cost given your situation.

At that point, you will have enough information to know if long-term care is right for you. It's pretty straightforward. Is it easier to meet in morning or afternoon? [set the day/time]

Are you able to be on the phone and computer at the same time?

What made you send in this card? Do you have a financial advisor telling you to do this? Or have you had family experience with LTC? [ask all 3 questions together]

LET THEM ANSWER - ACKNOWLEDGE, AND RESPOND TO WHAT THEY SAY

“I see why you’re looking into this”.

Please make sure to book me in your calendar for [Date] at [Time].

I will email a confirmation of our appointment and a link to the website we will use. Please respond to my email so that I know that you’ve received it.

In advance of our meeting I am also attaching the booklet we authored, “Dignity For Life”. It is an excellent start to learning more about LTC.

If anything comes up and you need to reschedule, please contact me at least 24 hours in advance, so I can give your spot to someone else.

I look forward to meeting with you soon. Good-bye.