Active Client Script

Hey (Client Name), it's (Your Name) with Final Expense Services. You have an active Life Insurance policy with us through (Insurance Company Name). I am just reaching out to check in and make sure we have all your information right.

Review the Face Amount, Premium, Address & Cash Value (if it has any).

Ok, great! I am glad we have your information right!

Have you purchased another Life Insurance since purchasing the one with us?

If NO, **"Ok, I just wanted to double check."**

If YES, **"Oh ok, how long ago did you get that one?" You can use this information in a few.**

When we speak to active policy holders like yourself, they usually want to do one of 3 things: (Can change it to 4 things if you offer multiple products, then add in #4 below.)

1 - See if there are any upgrades that could save them money each month.

2 - See if they would qualify to access their full cash back amount. I mean, who couldn't use (say their cash value amount if you know it), right?

3 - Due to how the cost of everything continues to skyrocket, see what it would even cost to add a little additional coverage to what they have.

4 – Get some information on additional products like (name off the other products you write).

Which one of those makes the most sense for your situation?

Agent - No matter what they pick - **"Perfect! That is the option that most people choose. The good news is, it does not take but just a minute for me to check that for you since you are already a policy holder with us."**

Appointment Setter - **"Perfect! That is the option that most people choose. The process is extremely simple; we just have to get the agent that is assigned to you to get that information over to you. What is the best time later today or tomorrow for them to call you and get this information for you? It only takes 4-5 minutes, and the information does not cost you anything."**