

Trustworthy Financial MP Appt Script

Hey, [CLIENT FIRST NAME], this is Mike with the Mortgage Protection Department I'm circling back about that recent inquiry you made online looking for information on protecting your mortgage in the event of death or disability, I just need to confirm the information that I have here for you, so that we can schedule a time to speak a little later.

[CLIENT FIRST NAME], you said here that your mortgage is less than 250,000. Is that correct? *YES*. What is the current mortgage balance? *Approximate 195,000*.

OK And you said that your payment was between 0 and 1000 a month. What's your actual payment? *About 1100*.

OK And [CLIENT FIRST NAME], you said your beneficiary, if something were to happen to you would be [BENEFICIARY]. What is [his/her] name? *Spouse Name*

And [CLIENT FIRST NAME], do you both work FT, PT or are you retired? *We Both Work*

OK. [CLIENT FIRST NAME], were you looking to get numbers on both of you or just on yourself? *Both of us*

All right. And let me just confirm your e-mail, I've got [email address]. *Correct*.

Perfect. Now, what time do the two of you get off work today?

-or-

Would morning, afternoon, or evening work better for the two of you tomorrow?

If I could squeeze you in would [time] or [time] work better for the two of you?

Is there any reason you can think of that the two of you would not be able to meet with me at [time/day]? *No Sir*

OK, I'm going to go ahead and send you a calendar invite with a Zoom link for you to be able to jump on at [time/day]. I'll see you on the Zoom at [time].