

FINAL EXPENSE INSURANCE

Hi (Client), My name is Al, I'm just getting back to you regarding the request you submitted on FB for information on Final Expense insurance programs, you said your favorite color is _____. You put down your address is 123 Main St and that your DOB is _____. Is that correct? It's my job as the local field underwriter to go over the health criteria so we can determine which plan you can qualify for. **Are you single or are you married? If married, they both need to be home for the appointment. Are you retired or are you still working?** If they say, I'm still working ask them What time do you typically walk in the door? I will be in your area on Tuesday about 8:15am or at 9:30am, which works better for you and your wife? Perfect (Client) again, I will be the one coming out to see you. **Now, Are the numbers to your house on the curb or on the house? Are they easy to see? Do you have a gate that will keep me from getting to the front door? Do you have any wild dogs that will eat me up when I come to the front door? Lol. Cool, now is there any reason that you and your wife won't be home on Tuesday at 8:15 Tuesday morning? I will only give you a call if I need directions. Would that be ok?**

Always schedule on the 15 1:45 or 2:45 etc. People statistically remember these times better than on the hour or :30.

Can you just mail me the information? These plans are non medical, so they require No blood or urine, but they do require a Field Underwriter to verify you are in person. Al can see you at 8:15 or 9:30 which works better for you?

I didn't mean to fill it out or I didn't fill it out. We just received your request and your DOB is _____ ? and your address is _____ ? and your age is _____ ? It's just our job to get you the information you requested. What you do with it is up to you. Al can see you at 8:15 or 9:30 which works better for you?