



CALL-IN A-LEAD SCRIPT



A LEADS

CALL-IN
INCOMPLETED IPL'S

UniTrust Agency

HEY _____, IT'S (YOUR NAME)...HOW ARE YOU?

Good thank you...

I'm just giving you a quick call regarding your (Bank Name) mortgage over on (street name) in (City). It looks like we sent an urgent letter to you a few days ago where you had to call in to an automated line...use your mortgage id and answer some questions.....You remember doing that?

No problem.....THAT'S EXACTLY WHY I CALLED...

I'm the field underwriter assigned to go over the mortgage protection options with you and they have me out either _____ or _____ and I just needed to see which day is better?

Verify information

Make sure spouse will be there

Get health info

Get directions to the house

Tie down the appointment

