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**CALL-IN  
BONUS LEAD  
SCRIPT**

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**B, C, D, E, AND  
AGED IPL  
LEADS**

CALL-IN &  
INCOMPLETED IPL'S

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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 a while ago where you had to call in to an automated line...use your mortgage id and answer some questions.....You don't remember doing that do you?

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

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