
DIRECT MAIL
BONUS LEAD
SCRIPT



B, C, D, E LEADS

FOR DIRECT MAIL
LEADS AND
MORTGAGE DATA
CARDS ONLY

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 a while ago you
had sent back a form about mortgage
protection options....You don't remember
doing that do you?.....I didn't think you
would.

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

