



Final Expense Script

Hi, this is **Steven Smith** from Senior Financial Solutions, how are you today?

The reason we're calling you today is, in reference to the end-of-life financial planning. And we wanted to update you regarding the **New State regulated, Final Expense, Whole Life Insurance Plans** which are designed to cover 100% cost of Burial, Funeral, and Cremation expenses. These Plans are for people on fixed Income, Social Security, or Disability income.

OPT-IN: If we are able to offer you something affordable that fits your needs regarding your final expense and possibly get you the best coverage available in the market, **would you consider starting your coverage in the next 30 days?**
(Take a clear Yes)

I'll have a few questions to ensure that you qualify for a plan that fits your needs and then I'll let you speak to the product specialist who's going to provide you with a no-obligation quote. So

Qualifying questions:

1. **How old are you?** (You sound so young, must be taking good care of your health).
2. **Do you make your own financial decisions?** (Take a Clear Yes)
if no: Do you pay your own bills (If still no, Cx is disqualified).
3. **What is your Zip code?**
4. **Do you have a valid checking or savings account?**
 - a. IF Cx does not give a proper reply, ask (If you decide to go with this policy, how would you prefer to pay your monthly premium?)
 - b. Where do you receive your Social Security income? (if the customer says the bank, it means he has an account).
 - c. Do you have a Debit card/ Direct Express card? If yes, is it associated with the Bank.
5. **How Do you Spell Your First Name?**
6. **How Do you Spell Your Last Name?**
7. **What is your DOB?** (In order to Determine the Best plan for you)

Transfer Line: Thank you for your cooperation Sir/Ma'am/Name. That's all from my side, now I'm going to bring my specialist on the call, and he'll assist you further regarding Discounts, Prices & benefits of final expense insurance. OK?