

NASHVILLE FINANCIAL

- Insurance Lead Warehouse -

PHONE LEAD SCRIPT

*For Complete and Incomplete Phone Leads
For best results, call the phone lead within 2 hours.*



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 an automated line... use your mortgage ID and answer some questions. Do you remember doing that?

Great / No Problem... THAT'S EXACTLY WHY I CALLED!

I'm the field underwriter assigned to go over the mortgage protection options with you. They have me out in your area either _____ or _____ and I need 15 to 20 minutes to get together with you. Which day is better?

*Verify Information * Make sure spouse will be there * Get health info
Get directions to the house * Tie down the appointment*