

Closrtech - Premium Volume Lead Intro Script

"Hey (First Name)?"

(Pause for confirmation.)

"Hey, this is (Your Name). I was just giving you a quick call because it showed up here that you, or someone in your family, were looking into life insurance options in (State), maybe to leave some money behind for a member of your family. Does that sound familiar?"

If they say "Yes":

"Perfect. I'm the agent assigned to your file. My job's just to show you what options are available and help you find something that fits. Won't take long."

If they say "No" or "Don't remember":

"Gotcha, sometimes these get filled out by a family member or spouse. The file here had your birthday listed as (Birthday), is that right?"

"Yeah, gotcha. Usually when we see these come through, it's someone just trying to make sure a member of their family isn't left covering everything. So what I'll do is pull up your options here, and we'll take a quick look at what's available."