



Hi [FirstName], my name is [FirstName] _____ [LastName]
_____ with [BusinessName] _____. I'm calling
in regards to your Medicare Supplement plan with [Insurance company].

Once a year, we like to touch base with our clients: first, to see how you are
and then to see if we can find you lower rates with the same or better
benefits. This is also a good time for me to answer any questions you may
have about your plan or maybe another plan that you have heard about.

First, I wanted to check on you. How are you doing?

Still at _____ address?

We have you paying \$ _____ each and every month with
[Insurance company]. Is this still accurate, or have you seen a recent
increase?

I have your age as _____, is that correct?

Some plans offer a discount if someone else resides with you. Does
anyone else live in the home with you?

As your trusted advisor and part of your annual review, sometimes I have
to ask difficult questions to make sure you and your family are protected.

Federal and state privacy and telemarketing laws continue to remain in effect. Outbound calls or texts must comply with federal, state and local restrictions and guidelines. Calls and texts are prohibited to any numbers on state and federal do-not-call lists, and telemarketers must record, maintain and honor internal do-not-call lists. The use of auto-dialers to call or text must be limited to recipients who provided express written consent to be contacted about the products. Telemarketers are not allowed to make unsolicited calls to any person under a declared state of emergency. Callers must disclose the identity of the seller, inform that the purpose is to sell goods or services, and explain the nature of the goods or services being offered.

[FirstName] _____, if you died today, how would your family pay for your funeral?

[Pause, let them answer]

One of the most important aspects of my job is to ensure you have enough protection in place with life insurance. I work with several major insurance companies who can help you get that protection, and spare your family an extra burden in the time of distress.

[Go into a standard sales presentation based upon application and underwriting process/questions. If you need a basic Final Expense sales presentation work with your Marketer.]

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