



Hi [FirstName], my name is [FirstName] _____ [LastName]
_____ with [BusinessName] _____.

I had the pleasure of serving [FirstName] _____ [LastName]
_____ over on _____ 'Street' in [City] _____ and
your name came up.

I'm a licensed insurance agent and it's my job to inform individuals in the
state on what Medicare and benefit options are available when you turn 65.

Sorting through all of your Medicare options can be very confusing. But
don't worry, I'm here to help. I'd like to gather some information about you.
This will allow me to figure out which of our plans may be available for you,
but most importantly will allow me to find the plan that best fits your
healthcare needs and your budget.

[Verbiage for Call Screeners, or if the client is not available:] That
being said, I have some other appointments already scheduled today, but I
can get back to you either at _____ or _____, what time is better?

[Moving into the Sale for Ready to Write Agents:] Now, while I have you
on the phone, do you have any major medical conditions I may need to be
aware of?

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.

Any heart attacks, strokes, cancers, diabetes - or any other conditions?

(If yes: Got it, how long ago were you last treated?)

We can also look into options to help lower your prescription drug costs.

Are you interested in lowering the cost of your prescriptions?

[Go into the standards sales presentation based on the application/underwriting questions based on how the previous questions were answered.]

If the client is not available/does not have time – go into closing:]

Once again, my name is _____. I'm the one who will be reaching out and helping you along the way. I'll be calling you on _____ at _____. Have a great day!

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