

# MORTGAGE PROTECTION CALL SCRIPT

## CHUCK KNOX VERSION



**[CLICK HERE TO WATCH THE ACCOMPANYING TRAINING CALL](#)**

### **WHEN YOU GET THE POTENTIAL CLIENT ON THE PHONE:**

*I'm calling in regard to your loan with (Mortgage Company) at (address).*

*I'm the advisor assigned to you for your Mortgage Protection.*

*I'm reaching out to schedule a quick 5-minute call later this afternoon or evening to go over your options.*

*When's the best time I can spend 5 minutes with you?*

*Are you married? Will your spouse be home? (ALWAYS CONFIRM, do not run the appointment if the spouse/co-borrower isn't there).*

*I'll see you at (day and time).*

### **WHEN THE POTENTIAL CLIENT ASKS, "WHAT IS MORTGAGE PROTECTION?":**

*This is the protection on the loan in case of death or disability; it will pay off or make payments on the loan to protect you and your family from foreclosure.*

### **WHEN THE POTENTIAL CLIENT SAYS, "I ALREADY HAVE THIS TAKEN CARE OF":**

*Great, let me update your file. What's the name of the company you have? How much are you paying?*

*-You're getting info to search for better options.*

### **WHEN THE POTENTIAL CLIENT SAYS, "I CAN'T AFFORD IT":**

*I understand. I'm not sure whom you spoke to in the past, but I'm 100% confident that we can find something in your budget. Do you have a couple of minutes?*

# STEPS BEFORE THE MORTGAGE PROTECTION SALE

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### 1. **\*\*APPOINTMENT TIME\*\***

Do not run the appointment if the spouse/co-borrower isn't there.

### 2. **SEND LICENSE EMAIL**

*The state of \_\_\_\_\_ requires that I send you my credentials before we start.  
What is a good email address for you?*

### 3. **AFTER YOU SEND EMAIL, CONFIRM INFORMATION ON THE LEAD**

- *Mortgage Amount*
- *Age(s)*

### 4. **ASK IF THEY RECEIVED THE EMAIL**

### 5. **READ THE EMAIL TO THEM**

*In the attachment you will see my state of \_\_\_\_\_ license, that is for your records."*

*"When you look down at the signature of the email, you will see a link highlighted in blue. It says 'whereby.com'; do you see it? Click on that for me. That is the link that we use to review your options with you.*

### 6. **GET CONNECTED ON WHEREBY**

- *When you look down at the signature of the email you will see a link, it says whereby.com. Do you see it? Click on that for me.*
- *That is the link that we use to review your options with you.*
- *Click "Continue"*
- *Request permissions; say allow or cancel. "You don't have to use your camera; it's more for you to see me and the options I present to you."*
- *Then press "Continue"*

### 7. **RUN THE PRESENTATION**