

Gen Okoro Final Expense Script

(Client's name)? (Client's name), this is Gen I am calling from the senior benefits center, RIGHT here in Richmond. I'm getting back to you about the request you made for information on final expense coverage. Do you remember doing that?

Perfect. You put down your date of birth as () and you put down OLD OR CURRENT address as (), is all that stuff still accurate? Perfect. Again my name is Gen, last name is Okoro. I'm the local field underwriter and broker assigned to your case. I'm the one who is required to go over the information with you so you know what it is that you can possibly qualify for.

Just like it said on the form, there's no physical exam, no needles, no blood, no urine, nothing like that. I just have to make sure you are who you say you are, you're not strapped to a hospital bed or on oxygen full time or anything like that. And you DO need to see my state license as well. Should take about 15 minutes or so. Are you still working/disabled/retired?

Will it just be you or do you have a spouse or partner that will be going over things with us?

Ok are you working tomorrow/do you have any doctors appointments tomorrow? Ok what time are you Usually off work/what time is your appointment?

Working: Got it. I don't have a (___ whatever time they said they'll be home), but I do have a ___am/pm (give 30 mins — 1 hour after they said they'll be home). Is there any reason you wouldn't be home between (5&6pm —give yourself an hour window) tomorrow?

Doctor's/Other appt: Got it. I don't have a (___w/e time they said they'll be done with doc), but I do have a ___am/pm (give 1 — 2 hours after they said they'll be done with at doc). Is there any reason you wouldn't be home between "5&6"pm (give yourself an hour window) tomorrow?

Not working, no appointments: Got it. Are you a morning person? Or not so much? Ok..let me see.....I don't have a, but I do have a ___am/pm (give 30 minutes+ after they said they'll be up/available). Is there any reason you wouldn't be home between "5&6"pm (give yourself an hour window) tomorrow?

Ok, great, I'll put you down for that—I want to give you my Virginia state license number, that way you can always look me up, and you're able to see I'm a licensed professional and not a crazy person (small laugh). Just let me know when you're ready and I'll give you all my info.

First, my last name is spelled O-K-O-R-O, first name is Genevieve, and we said ___day between 5 & 6PM. I'm SUPER tall, like 6'4 in heels (change this part to be descriptive for you), so you'll know it's me but still—My state license number is (#). Can you read that back to me? Any gate codes or buttons I need to push — Or can I just knock on (re-verify address)? Perfect. Any big dogs that are gonna try to bite me??

It sounds like you are really good about keeping your appointments, so I'm not going to be standing outside, sweating, wondering where you are, RIGHT (client's name)??

Ok (Client's name), I'll see you on _day between “_&_” time; I look forward to meeting you and helping you.