



Premium Lead Solutions

EXCLUSIVE LEADS PROVIDER

Final Expense Insurance Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] with [Company Name]. How are you today?

[Pause for response.]

I'm calling because you recently expressed interest in Final Expense Insurance—a life insurance plan designed to cover funeral expenses. We have a low-cost plan recently approved in your state. I'd love to provide more details and help you find the best coverage option.

Before we proceed, I'd like to ask you a few quick questions to ensure we're offering the best plan for you.

Information Gathering (For All Scenarios)

1. Full Name:

- Could you please confirm your full name?

2. Date of Birth:

- May I ask your date of birth to ensure you qualify for the plan?

3. Address:

- Can I please confirm your address to ensure we have the correct location for this plan?

4. Beneficiary:

- Who would be the beneficiary of this policy (spouse, child, etc.)?

5. Coverage Amount:

- What coverage amount are you interested in? (\$5,000, \$10,000, \$20,000)
6. **Smoker or Non-Smoker:**
- Are you currently a smoker or a non-smoker?
7. **Active Checking or Savings Account:**
- Do you have an active checking or savings account where payments can be made from?
-

1. Callback Lead Handling

Step 1: Confirm Interest

- Are you still interested in learning more about this Final Expense Insurance plan?

Step 2: Schedule a Callback

- When would be the best time for our agent to call you back to review your options? We can schedule it for:
 - Morning
 - Afternoon
 - Evening

Step 3: Verify Details

- I just want to confirm the details so we can schedule your callback:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status
 - Checking/Savings Account

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] on [Scheduled Time]. Please expect the call, and thank you for your time!
-

2. In-Person Appointment Handling

Step 1: Build Interest for In-Person

- If you prefer, we can set up an in-person meeting with one of our agents to go over the plan in detail and help you select the best option. Does that sound good?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
 - Option 1: [Date/Time]
 - Option 2: [Date/Time]

Step 3: Verify Details

- Let's go over your information to ensure everything is set for the meeting:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status
 - Checking/Savings Account

Step 4: Confirm Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. They'll provide all the details you need to make the right choice.
-

3. Live Transfer Handling

Step 1: Live Transfer Introduction

- I can transfer you to a specialist right now who can walk you through the final expense plan in more detail. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
 - Full Name
 - Date of Birth
 - Address
 - Beneficiary
 - Coverage Plan
 - Smoker/Non-Smoker Status
 - Checking/Savings Account

Step 3: Initiate the Transfer

- Perfect! I'll transfer you now to [Agent Name], who will guide you through the process and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.
-

Common Rebuttals (For All Scenarios)

- **Not Interested:**
"I understand. However, this plan has helped many people like yourself secure affordable coverage. Would it be okay if our agent calls you back to provide more information?"
 - **Already Have Insurance:**
"That's great! Many of our clients already had coverage, but found this plan offers better value. Would you be interested in exploring your options?"
 - **Can't Afford Right Now:**
"I understand, and that's what makes this plan great—it starts at just \$1 a day. Could we set up a quick callback to go over the details?"
 - **How Did You Get My Information?:**
"We usually receive information through online requests or from senior databases."
-

Final Confirmation (For All Scenarios)

Before ending the conversation, always confirm the following details:

1. Full Name
 2. Date of Birth
 3. Address
 4. Beneficiary
 5. Coverage Plan
 6. Smoker/Non-Smoker Status
 7. Active Checking or Savings Account
 8. Next Steps (Callback, In-Person Appointment, or Live Transfer)
-

Closing Statement

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best final expense plan to protect your family. If you have any questions, feel free to reach out to us at [Phone Number]. Have a great day!

Premium Lead Solutions