

Hello, _____ (call by first name)? (Pause)

_____ (first name), this is _____ (your name) over in _____ (your city).
I just wanted to touch base with you about the request you submitted online for Health Insurance.

Just to give you a little information about us, our company is Strategic Transitions. We're brokers. That lets us shop through all the major carriers for you like Blue Cross and United to find the very best programs. But what makes us different from other brokers is that we are able to help individuals qualify for the new State programs that are available.

These plans have rates as low as \$39.00 and have no deductibles. You definitely can't say that about the Blue Cross plans out there, right?

But to qualify for one of these State plans they have some requirements you need to meet that are based on your income, family size, and financial assets. So with that in mind, I just need to ask you a few questions to see if you qualify. Is that all right? (Pause) Great!

So are you single, married... any kids? (Pause)

Are you employed? Do you (does your spouse) work for yourself or someone else? (Pause)

Does your (your spouse's) employer offer you health coverage? (Pause)

Tell me the gross amount of your (your spouse's) paycheck... that's the amount before they take out any taxes. (Pause)

Do you have an IRA, 401(k) or other retirement plan? (Pause)

Do you have any cash value life insurance policies? (Pause)

And do you own any real estate, annuities or do you have a pension? (Pause) OK.

Well... What I NEED to do now is set up a time to get together with you both. It's about a 20 to 30 minute get together based on what you've told me.

So which evening works better for you both, Tuesday or Wednesday? (Pause)

Tuesday? Great! I have an opening at 5:15 or 6:15. Which time works better for you both? (Pause)

O.K. 6:15 Tuesday will be fine I am marking it down in the book for Tuesday the 21st at 6:15 and I need you to mark it down somewhere for Tuesday the 21st at 6:15 also.

You guys are still at 123 Main St., correct?

O.K... great! I will see you guys Tuesday at 6:15ish then... bye, bye.

