

Sample Life Lead Plus Script from HBW Leads

INTRODUCTION

Hello, this is **[Telemarketer's Name]** calling from **[Agency Name/Carrier]** on a recorded line, how are you today? As a leading provider of life and financial protection, we are helping neighbors in your area ensure that they and their loved ones are protected.

QUALIFYING QUESTIONS

1. Do you currently have Life Insurance?
 - a. If Yes: Do you have work insurance, independent insurance, or both?
 - b. If Independently: Who is the policy with?
 - c. None
2. Are you happy with the amount you are saving for retirement?
3. Do you have any retirement accounts like an IRA or 401k?
4. Do you own or rent? [If yes, the lead qualifies]
5. Are you married?
6. How many qualified dependents do you have?
7. If Yes: What are their first and last name(s)?
8. Are you still living at **[Insert Address]**? [Verify the complete address including zip code]
9. Are you between the ages of 18-60? [If yes, the lead qualifies]
10. What is your date of birth?
11. What is your email address?
12. What is the best time to reach you?

WRAP UP

That is all we need right now, **[Prospective Customer's Name]**. **[Agent Name]** will be giving you a call back within 1 to 2 business days to go over the life insurance and financial review they have prepared and may possibly need to ask you a couple more questions about the information you've given me.

Does that sound okay? **[Must say "YES" to be counted as a lead]**

Thank you very much for your time and have a great rest of your day.