

## FINAL EXPENSE APPOINTMENT SETTING SCRIPT

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### 1. Core Script (Initial Call)

**Agent:**

Hi [Client's Name], this is [Your Name] from Legacy. How are you doing today?

**Client:**

Good, thanks. You?

**Agent:**

Doing great, thanks for asking. I'm just getting back to you about the request you made for information on our **Final Expense programs** — these are affordable plans that help cover things like funeral costs, cremation, and other final expenses so your loved ones aren't left with the burden. Does that sound familiar?

**Client:**

Yes / Maybe / Not sure.

**Agent:**

Totally understandable — a lot of folks I speak with don't always remember filling it out. It might've been a card in the mail or something online. No worries — I've got your info here, and it only takes a few minutes to go over what you might qualify for.

I'll be helping families in your area on [insert day], and it just takes about 15 minutes. Would morning, afternoon, or evening work better for you?

**Client:**

[Chooses time]

**Agent:**

Perfect. I've got [Time A] and [Time B] available — which works better for you?

**Client:**

[Chooses time]

**Agent:**

Great, I'll mark you down for [Day] at [Time]. Just to confirm — is [Address] still correct? And is this a house or an apartment?

**Client:**

[Confirms]

**Agent:**

Awesome. I'll send you a quick confirmation text or email with all the details. During our meeting, I'll go over the different options, answer any questions, and help you find something that fits your budget and protects your family. Sound good?

**Client:**

Sounds good.

**Agent:**

Looking forward to it, [Client's Name]. If anything comes up, just reach out. Have a great day!

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## 2. Voicemail Script

"Hi [Client's First Name], this is [Your Name] — I'm just getting back to you about the **Final Expense information** you requested. I've got your file here and just need to verify a couple things before we go over the options.

I'll try you again shortly, or feel free to call me back at [Your Phone Number]. Again, this is [Your Name] with Legacy regarding your Final Expense request. Talk soon!"

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## 3. Common Objections + Responses

 **"I don't remember filling anything out."**

"Totally fine — a lot of people don't. This was about Final Expense coverage, usually mailed to folks over 50 to make sure their families aren't left with the cost of a funeral or cremation. I've got your file here — I just need a few minutes to verify it with you."

 **"I already have something."**

"That's great — a lot of people I speak with do. I'd be happy to do a quick review just to make sure you're not overpaying or missing out on newer options. Do you remember who your current coverage is with?"

💬 **“I’m not interested.”**

“Totally fair. Most people aren’t... until they see how expensive things have gotten. I just need to mark your file complete so I don’t keep reaching out — does [DOB / Address] sound familiar?”

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#### ✉ **4. Follow-Up Message (Text or Email)**

##### **Initial Text or Email:**

“Hi [First Name], just following up on the Final Expense request you submitted. Haven’t been able to catch you — no rush, just need to verify a few things before closing your file. Let me know if there’s a better time to reach you. – [Your Name]”

##### **After multiple attempts:**

“Hey [First Name], I’ve tried reaching out a few times. Totally fine if you’re not interested — just let me know so I can close things out. Thanks either way!”

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#### 📱 **5. Text Message Follow-Up Templates**

##### 📱 **Initial Text (After Missed Call):**

“Hi [First Name], this is [Your Name] following up on the Final Expense info you requested. Just need to confirm a couple quick things. When’s a good time for a quick call?”

##### ⌚ **Light Nudge (Day 2-3):**

“Hey [First Name], not trying to bug you — just wanted to make sure you got the info you requested. I can go over it with you today if that helps.”

##### ✅ **Soft Close Text (Final Attempt):**

“Hi [First Name], I’ll go ahead and mark your file inactive unless I hear back. No worries either way — just didn’t want to leave this hanging if you still had questions.”