

Client Focus Connections  
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\_\_\_\_\_  
\_\_\_\_\_ Insurance  
Address \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Office \_\_\_\_\_ Fax \_\_\_\_\_  
Email \_\_\_\_\_

Hi, my name is \_\_\_\_\_. I'm calling on behalf of \_\_\_\_\_ with  
\_\_\_\_\_ Insurance.

\_\_\_\_\_ asked me to call you this evening to let you know about the Life Needs  
Analysis Developed by \_\_\_\_\_ Insurance.

One of the evaluations \_\_\_\_\_ provides, is to determine the amount of life insurance  
protection required to meet your family's current and future needs. \_\_\_\_\_ will show  
you how your savings, insurance and other assets can work together to provide for your  
family's security.

\_\_\_\_\_ is wondering if he/she can sit down with you to discuss your current level of  
protection?

YES - I'll need to ask just a few preliminary questions for \_\_\_\_.

How many adults and children are in the household?

And the ages of the adults?

Do either of the adults smoke?

When would be a good time for \_\_\_\_\_ to contact you to set up an appointment?

NO - Are there any other insurance needs that \_\_\_\_\_ can help you with at this time?

Thank you and have a good evening.