

Client Focus Connections
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Port Edwards, WI 54469
Office 877-692-3400 Fax 715-887-4039
Email cfc@wctc.net

_____ Insurance
Address _____
City/State/Zip _____
Office _____ Fax _____
Email _____

Hi, my name is _____. I'm calling on behalf of your agent _____
with _____ Insurance.

_____ asked me to call you this evening to remind you of the conversion
privileges with your current term policy. It can be converted into a whole life policy that
provides protection as long as you live and builds cash value.

May I have _____ call you to discuss this conversion privilege with you?

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 is a good time for _____ to reach you?

NO – Are there any other insurance needs that _____ can help you with at this time?

Thank you and have a good evening.

*PERMANENT Life insurance offers the advantage of lifetime protection and the ability to
accumulate cash values on a tax-deferred basis. So while you're receiving protection in
the event of your death, you are also building cash value, an option not available with
term insurance. The cash is available to you should you wish to surrender the policy or
borrow against it.*

Term conversion