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 your agent_____________ with ___________________ Insurance.

______________ asked me to call you to make you aware of some financial services and benefits that _____________ provides. Since many clients don't know about these products and services, allow me to ask you a few quick questions so we can provide you with the appropriate information.

Concerning your long-term financial nest eggs and Safe Money such as savings accounts, IRA'S, and CD'S, which of the following categories do you fall into?

A. You would like to keep money safe in case of financial emergency.
B. You would like to avoid income taxes and probate but keep it out of reach of Medicare in case you had to go into a nursing home.
C. You would like to get a better rate than the bank pays on IRA'S and CD'S.

Yes – When is a good time for ______________ to call you to answer any questions about how some of our programs might fit in with your long term financial concerns?

No – That's all right, we understand that not everybody has concerns in these area's. One final question and I will let you go. Are there any other insurance needs that __________ can help you with at this time?

Thank you and have a good evening.