

Client Focus Connections  
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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.

I'm following up on a letter \_\_\_\_\_ mailed to you regarding the financial  
services offered by \_\_\_\_\_.

\_\_\_\_\_ would like to help you with your financial planning whether it be debt  
consolidation, home equity loan, or personal loans.

May I have \_\_\_\_\_ give you a call to explain our financial services available.

YES – To help prepare \_\_\_\_\_ I'll need a little information.  
~ What type of financial planning would you like to learn more about?  
~ 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.