

Client Focus Connections  
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Hi, may I speak with the person in charge of the health insurance for the business?

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

\_\_\_\_\_ specializes in health insurance for the self-employed and small business owners.

We would like to offer you a free comparison quote. There are just a few quick questions I need to ask and then I can have an agent get back to you with a quote.

YES – Are you currently covered under a health plan? If so, who?

Do you know when it is up for renewal?

Will this be an individual, family, or group quote?

What is your age? And the age of your spouse? (If group quote- how many in the group?)

Will there be any children on the policy? And what are their ages?

And finally, when is a good time for our agent to get back to you?

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

Thank you for your time and have a great day.