This is **Alex Batista** with the benefits office in \_\_\_\_\_\_\_\_\_ County. I’m calling you back to let you know that we received your request for the State Regulated Mortgage Protection Program. It’s the one that covers your mortgage with *(Lender)* if you were to become sick or pass away. Does that ring a bell? **I’m the medical underwriter that was assigned to help you out** and I just have to verify the information you submitted to us so I can get some options out to you.  
(**WAIT ONLY A SECOND AND CONTINUE)**

* I show your **address** as *(Full Address).* **Have you moved in?**
* And I have your **age** as *(Age).*
* Are you **married**, **single**, **divorced**, or **widowed**?

OK, perfect, so again, my name is **Alex Batista,** and I was just letting you know **we received your request,** and that I will be the person getting this out to you and taking you thru a quick eligibility.

Now, just so we are clear, I just want to let you know that **my job is very simple**, I’m just a medical underwriter; I am NOT a nurse, so **there’s no physical exam, no needles, or urine samples**, instead, because it is State Regulated they send me out to you to verify that #1, you are who you say you are and that nobody is trying to get insurance in your name, and #2 to make sure you’re not hospitalized or bedridden or something like that. It should only take **10-15 minutes**.

Now, let me ask you real quick:

* Are you a **veteran**?
* Are you **working** full time, or are you **retired** or **disabled**?
* Do you have any **doctor appointments** in the next 2 or 3 days?

OK, perfect. Just so you know, there are typically a few options you may qualify for, and I will **personally** be working **for** you to find the best and most affordable ones. **Are you pretty healthy for the most part?** Do you smoke or use any other **tobacco** products?

(**ONLY IF THE CLIENT SHOWS A HIGH INTEREST AND CONCERNS)**  
Let me ask you, do either of you have any health conditions, like

* *Heart Conditions*
* *High Blood Pressure*
* *High Cholesterol*
* *Diabetes – Insulin? When was it diagnosed?*
* *Cancer*
* *Are you taking any medications for anything?*

Alright, they have me **dispatched** out your way tomorrow seeing about 12 other families. I have an opening at *(time)*, and at *(time)*, do you have a preference?

OK, write me down for *(time)*, and is that a **definite** time for both you and your spouse? Great!

I want you to write down some important information, **let me know when you’re ready**.

* Please write down my **name**, my name is Alex Batista *(spell it)* and I’m your assigned case worker.
* Write down our **appointment time**, it’s tomorrow at *(time)*
* That this is regarding your **request for Mortgage Protection**.
* And write down your **confirmation code** which is **90-764-90** which is also my North Carolina state license number.

Also,

* Is this a **good number to reach you** if I get lost?
* Are there any **big dogs** I need to be concerned about?
* Any **gate codes** or **guard houses** that need to be called ahead?
* Are the **numbers** on the **house** or on the **mailbox**?

OK, just so you know, I’ll be driving a **black Honda Accord**, please let *(spouse)* know that I’m coming. And when I get there, **do I park** on the **driveway**, on the **street**, or are there any **designated visitor’s parking spaces**?

Okay great, I will see you tomorrow at *(time)*.

**VOICEMAIL:**

Hey (*First Name*), This is Alex Batista.

I’ve been trying to reach you to handle an open inquiry that **you originated** regarding the Property at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

It is important that you call me at **(910) 705-4777** so that I can handle it properly. Have a blessed day.