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 local medical underwriter assigned to help you out** and I just have to verify the information you submitted so I can get some options out to you. (**WAIT ONLY A SECOND AND CONTINUE)**

* I show your **address** as *(Full Address)*, is that all correct?
* And I have your **age** as *(Age)* years young, is that correct?
* Are you **married**, **single**, **divorced**, or **widowed**? **Beneficiary**?

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 handling this for 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 will have me verify 2 things; #1, that you are who you say you are and that nobody is trying to get insurance in your name, and #2 that you’re not hospitalized or bedridden or something like that. So, for that, we’ll have to meet via **Zoom** so we can see each other. Does that make sense? It should only take **15-20 minutes**.

Now, let me ask you really 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 **handling your area** tomorrow helping 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!

* What’s your **email address** so I can send you the video conference link?
* Is this also the best **number to reach you**?
* Can I **text** you at this number?
* Ok, give me a second, **I am going to send that link right now**. Let me know when you get it.  
  (**CONFIRM THAT CLIENT RECEIVES EMAIL WITH VIDEO LINK)**
* Perfect, this way we’ll be able to see each other, and you’ll be able to see my screen.

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

* Please **SAVE MY NUMBER**, my name is **Alex Batista** *(spell it)*My number is **(910) 705-4777**. I’m your assigned **medical underwriter**.
* Please make sure than both you and your spouse have an ID.
* Please have any medications you’re currently taking handy.
* Add our appointment to your calendar; it’s tomorrow at *(time)*
* Please try to **join our Zoom meeting a few minutes early** in case you have any technical difficulties.
* I will also give you a call before the meeting.
* If for any reason you need to reschedule, please click the “Reschedule” button on the email at least an hour ahead, or simply call me or text me.

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.