Hello \_\_\_\_, this is \_\_\_\_ getting back to you regarding your mortgage with ***chase.*** You had sent us a card requesting information on a protection plan that would pay down your mortgage in the event of death.

 Now you wrote here your birthday is ***June 1, 1971*** and your wife’s is ***July 2, 1973***, and you are both nonsmokers is that about right? What is your wife’s first name? Mary

Perfect, again my name is \_\_\_\_\_ and I am the underwriter that’s been assigned to your case. The way these programs work is that there’s no physical exam, no blood test or nurse visit, they just want us to bring out the information to confirm your identity and go thru the program… it takes about 10 minutes.

Do you work 9-5? What time do you and Mary typically get home?

***6:00***

Perfect, I have a ***6:15*** tomorrow, does that work for you and Mary?

Do you have a pen? I would like to give you my information…

My name is Cindy…. its mortgage insurance…I’ll put you down for tomorrow ***June 4th*** at ***6:15 pm***

Can you give me a window between 6:15 and 7:15 in case I’m running late?

 I have about 15 appointments tomorrow.

Now I have you at ***123 Cherry Lane***, is that about right?

Perfect! Is there a gate out front or may I just knock on the door?

If you can please let Mary know I’ll be dropping by I look forward to seeing you both.

AIM Acknowledge, Ignore, Move Around