

AGED CHRISTIAN CALL SCRIPT (Revised)

Opening (gentle + permission-based)

“Hi, is this [Name]?”

Hey [Name], this is [Your Name].

You had requested some information a little while back about financial options that align with your values... I just wanted to follow up and see what you were hoping to find.

Did I catch you at an okay time?”

Connection (let them lead the faith angle)

“Gotcha. And just so I understand better...

When you filled that out, were you mainly looking for something that reflects your beliefs, or more just making sure everything is handled the right way for your family?”

(wait and mirror their language)

“I respect that. A lot of people I speak with feel the same way, they just want to be wise and intentional with their decisions.”

Rapport (human first, not religious first)

“Have you already put anything in place before, or is this something you’ve been meaning to get around to?”

Needs (simple + grounded)

“Usually it comes down to a couple things:

- Making sure family is taken care of
- Not leaving a burden behind
- Or just having peace of mind that everything’s in order

Which one feels most important to you right now?”

Qualification (softened)

“Got it, that helps a lot.

And just so I point you in the right direction,
have you had any major health issues, like heart, cancer, or anything ongoing?”

Value (tie to stewardship, not pressure)

“Okay, perfect.

So what I do is help people find options that are:

- Simple and easy to maintain
- Something they can feel comfortable with long-term
- And structured in a way that really takes care of the people they love”

“A lot of folks like that it’s straightforward and gives them that sense of peace knowing things are handled.”

Close (calm, not preachy)

“Let’s do this, I’ll walk you through what you qualify for and keep it very simple, no pressure.”

“Takes about 10–15 minutes.

Would later today be better for you, or is tomorrow easier?”