

AGED MORTGAGE PROTECTION CALL SCRIPT (Revised)

Opening (soft + disarming)

“Hi, is this [Name]?”

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

You had requested some information a little while back about protecting your home... I’m just the one assigned to follow up with you.

Did I catch you at an okay time?”

Confirm (non-confrontational)

“Perfect.

And just to make sure I’m looking at the right info...
you’re still a homeowner, correct?”

(If yes → continue. If hesitation → clarify gently)

Rapport (quick and relevant)

“Got it. And how long have you been in the home?”

(optional follow-up)

“Nice, that’s a big accomplishment these days.”

Reframe (why you're calling without pressure)

“The reason I’m calling is a lot of homeowners we speak with just want to make sure things are set up properly... so if anything unexpected happens, the home doesn’t become a burden.”

Needs (guided but not pushy)

“Usually it comes down to two directions:

- Some people want the mortgage completely paid off
- Others just want to make sure the monthly payments are covered

Which one were you leaning toward when you filled that out?”

Qualification (smooth transition)

“Gotcha, that helps.

And just so I don’t point you in the wrong direction,
have you had any major health issues like heart, cancer, or anything ongoing?”

Value (tie to real outcome, not features)

“Okay, perfect.

So what I do is help homeowners find options that:

- Keep the home secure for the family
- Don’t increase over time
- And are simple to keep in place”

“Some plans also allow access to funds early if something serious happens, so you’re not stuck financially.”

Close (assumptive + low resistance)

“What I’ll do is walk you through what you actually qualify for and keep it very straightforward... takes about 10–15 minutes.”

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