



IUL

Setting Appointment Phone Script

NOTE: This script is for website lead (make it your own!)

Hi Gabrielle, this is Dan Hatcher. I'm giving you a call back about that - You know you saw an ad on google about the IUL and being your own bank, you know the compounding and you went to my website and filled out that form. You remember doing that?

Yes I do.

Well the reason I called... I didn't call to go into this now with you, but I did want to call and set up a time that would be convenient in your schedule and mine where we could get on a zoom call. This way I can share my screen with you, we can enter your numbers into the software and just see what an IUL can do for you.

Well okay.

Let me ask you what's your schedule like tomorrow or Monday?

We can do Monday morning I'm free.

All right. Let's see here. So now you're in Florida right? Okay now how is bright and early Monday morning like nine or ten or earlier? Or Later?

Nine or ten is fine.

Alright. Let's say 10 o'clock.

Yes I can do 10.

Now what I'm gonna do here as soon as we hang up...I'm gonna drop you an email with a zoom link. And the email I have here for you is Gabrielle123@gmail dot com, correct?

Okay. Yes.

Perfect. Well if you would Gabrielle when you get that email; you know when you happen to check your email and see that just hit reply and let me know that you got it.

Yeah.

Now what I'll do is on Monday morning, I'll send you a reminder, and it's after the weekend I'll probably send the zoom link again, so it'll be at the top of your inbox, you don't have to go hunting for it, you know what I mean?

Okay.

All right. So you have yourself a great weekend. Look forward to meeting you then. Again, my name is Dan Hatcher.

Okay Dan.

You have a great one, Okay?

Alright, bye bye.