



INSURANCE CHECKUP PHONE SCRIPT

Introduction

As a financial professional, I'd like to help you make sure all of your financial goals are met. I know that life insurance is not a topic many people like to discuss, but I'd like to make sure your existing coverage meets your current goals.

Some questions to ask

Since you purchased this insurance, have you ever compared it with your current goals and lifestyle? What has changed in your life since you bought it? Have you been married, had a child, or started a business? Will your current coverage provide the protection you want for your family if something happens to you?

Let the client know how you can help

I can help you find out quickly and easily. I want to offer you a complimentary insurance checkup. The process is simple and you are under no obligation to purchase anything. Once we collect information about your current situation and any existing coverage, I can help you evaluate whether you are adequately protected.

Explain the benefits of an insurance checkup

You may determine that you want additional coverage, or simply wish to change the beneficiary. Perhaps you'll be reassured that your coverage is right for you just as it is.

Close

Can we set up an appointment to begin your complimentary insurance checkup?

Life insurance policies issued by Transamerica Life Insurance Company, Cedar Rapids, IA 52499.
Policies may not be available in all jurisdictions.