

# Phone Script - Servicing Existing Clients

Hi this is {Your Name}, Is {Client Name} home?

Hi {Client's Name} this is {Your name}, I'm sorry for bothering you I know you're probably busy, but I've been assigned to you. Am I catching you at a good time, do you have a minuet?

I'm your servicing agent, I'm certified my Medicare and licensed by the state; I see that (old agent) came out and helped you with some of your Medicare benefits through (carrier name).

It's my job to come out and do an annual review to make sure you are getting the most out of your benefits and because you are an existing client you qualify for a no-cost hearing & prescription discount cards.

(\*Setting the appointment)

I will be in your area on \_\_\_\_\_ and \_\_\_\_\_, and it only takes a few minutes. Which day is better for you \_\_\_\_\_ or \_\_\_\_\_? Is morning or afternoon better for you? I have an opening at \_\_\_\_\_ or \_\_\_\_\_ what time is better for you?

Let me confirm a little bit of information from you before I let you go,  
you're at {Address}, is that a house or an apartment?  
(If it's a HOUSE) Is it ok if I park on the street?  
(If it's an APARTMENT) Will I need to be buzzed in at the door?

**(if they give you an objection of I canceled, or I don't have them just say)**

THAT'S FINE, WHAT COMPANY ARE YOU WITH? GREAT I SERVICE THEM TOO.

As your serving agent it my job to review your benefits and see how things are going.

(Go Back to the \*Setting the appointment)

**(if they are still not interested)**

Ok, please visit "the insurance advisor.net" for updated Medicare information.