



American Income Life Insurance Union Phone Script

Agent: Hello, can I speak to _____ (**name**)?
My name is _____ from American Income.

I'm calling about the letter you received a while back from your local, (**state union name**) requesting the no-cost benefits. How are you today?

One of the benefits you requested is a (\$2000 or \$4000) Accidental Death & Dismemberment policy. Now, I see you put _____ (**Union members name**) down as the beneficiary. What's that relationship to you? (**If relationship is on the card, confirm it.**) Is that correct? I have your date of birth down as _____, I just need your husband/wife's date of birth.

The reason for my phone call is to deliver and explain these benefits to you and your spouse.

Now, _____ (**name**) what shift are you working tomorrow? What shift does your wife work? Now, what time do you guys eat dinner?

Great, I'll tell you what I'm going to do. I'm going to be delivering these benefits to you and (**spouse name**) tomorrow. I can see you at _____ o'clock, or would _____ o'clock be better?

Just so you know' I'm making a special trip out to see you and _____ (**spouse name**). My name again is _____ (**your name**) & I'll see you tomorrow at _____ o'clock.

