



## READINESS

Hi [First Name], my name is [First Name] \_\_\_ [Last Name] \_\_\_ with [Business Name] \_\_\_\_\_ here in \_\_\_\_\_ County.

I had the pleasure of serving [First Name] \_\_\_\_\_ [Last Name] \_\_\_\_\_ over on \_\_\_\_\_ 'Street' in [City] \_\_\_\_\_ and your name came up.

I'm a licensed insurance agent and it's my job to inform individuals in the state on what Medicare and benefit options are available when you turn 65.

Sorting through all of your Medicare options can be very confusing. But don't worry, I'm here to help. I'd like to gather some information about you. This will allow me to figure out which of our plans may be available for you, but most importantly will allow me to find the plan that best fits your healthcare needs and your budget.

**[Verbiage for Call Screeners, or if the client is not available:]** That being said, I have some other appointments already scheduled today, but I can get back to you either at \_\_\_\_\_ or \_\_\_\_\_, what time is better?

**[Moving into the Sale for Ready to Write Agents:]** Now, while I have you on the phone, do you have any major medical conditions I may need to be aware of? Any heart attacks, strokes, cancers, diabetes – or any other conditions?

(If yes: Got it, how long ago were you last treated?)

We can also look into options to help lower your prescription drug costs. Are you interested in lowering the cost of your prescriptions?

**[Go into the standards sales presentation based on the application/underwriting questions based on how the previous questions were answered.]**

**If the client is not available/does not have time – go into closing:]**

Once again, my name is \_\_\_\_\_. I'm the one who will be reaching out and helping you along the way. I'll be calling you on \_\_\_\_\_ at \_\_\_\_\_. Have a great day!